SYNERGY INTERNATIONAL SYSTEMS

CASE MANAGEMENT INFORMATION AND DOCUMENTATION SYSTEM

(CMIDS)

ANALYTICAL INTERFACE

USER MANUAL

Version 1.1

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1. INTRODUCTION

The purpose of this document is to describe how the *Case Management and Documentation System (CMIDS)* application functions and provide the necessary instructions to ensure successful work with the application. Use of this document and compliance with the standards specified herein is mandatory for anyone working with the above-mentioned application.

2. OVERVIEW

The African Court on Human and Peoples' Rights (AfCHPR) is a continental court established by African countries to ensure protection of human and peoples' rights in Africa. It complements and reinforces the functions of the African Commission on Human and Peoples' Rights. In an effort to have the Court address the complaints and applications received in the most efficient manner as well as to leverage the risk of data loss, the *Case Management Information and Documentation System (CMIDS)* has been developed.

CMIDS is an automated information management system which is designed to improve efficiency and coordination of court activities. It aims at providing the court administration staff with the possibility of managing and tracking case workflows within a court. The application is intended to replace the paper-based workflows and static spreadsheets currently in use with a fully integrated case tracking and reporting tool. *CMIDS* integrates web based tools for online data collection, searching, reporting, and workflow management.

The main objective of *CMIDS* is to serve as a reliable and credible source of information and to support the reform in the judiciary field in effectively supervising AfCHPR and improving its judicial management processes. It is also a powerful tool for preventing permanent loss of information, reducing risk of human error, and physical damage. The system serves as the main database and data collection and reporting system as it ensures effective access to the case data, promotes accountability and increases public trust and confidence.

CMIDS maintains the entire scope of case, charge and courtroom management from case initiation to disposition. It schedules court hearings, assigns judges, and maintains all the data provided by each court proceeding. All the hardcopy documents involved in complicated, lengthy cases may be scanned and retained for later viewing or reference.

In the current design, *CMIDS* consists of the following applications used to handle cases in the court:

- **Cases**
- **Translation Documents**

CMIDS is designed to provide quick access to the case / document translation data remotely via Internet. Once you have accessed the application, you can view the case / document translation data stored in the database, add new cases / document translation requests, edit existing ones, present the data in the form of different analytical reports, memorize/save

the reports, print them, and export them into various formats, etc. The case record form presents all information relevant to a case as well as the status of the case as it goes through the pre-defined workflow.

CMIDS provides a web-based user interface and requires a web browser pre-installed.

Note: To ensure more flexibility and a more user-friendly environment, *CMIDS* has been implemented as a multilingual system allowing the data to be presented in the system in four languages: English, French, Portuguese, and Arabic.

3. LOGGING INTO CMIDS

The starting screen of the *CMIDS* application is the *Login Screen* (Figure 1). To log in, you should validate yourself with the username and password and then click the **Login** button.

Note: The password is case sensitive.

Note: If you have failed to log in several times, the system will be blocked. Contact your system administrator in order to unlock your user access. The number of unsuccessful login attempts is configured from the Administration Center (see the *CMIDS Administration Center User Manual* in REFERENCES).

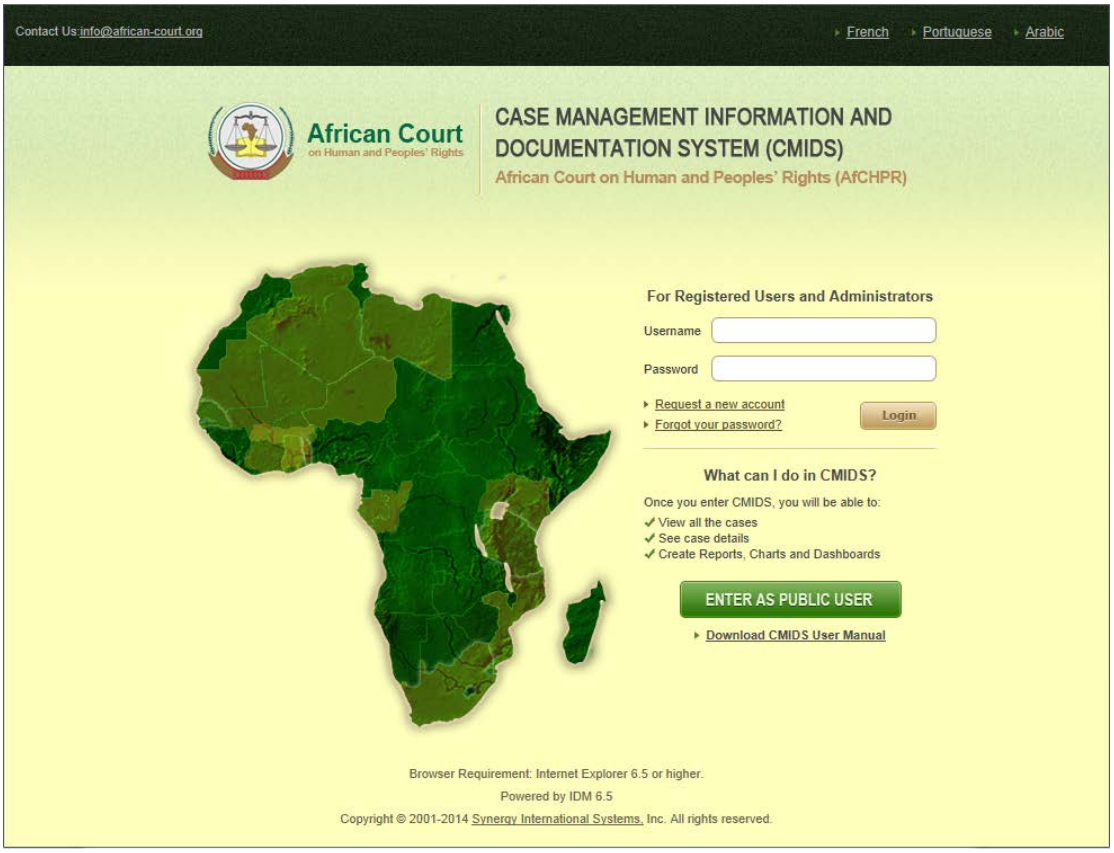
Contact Us info@african-court.org
French
Portuguese
Arabic
African Court
on Human and Peoples' Rights
CASE MANAGEMENT INFORMATION AND DOCUMENTATION SYSTEM (CMIDS)
African Court on Human and Peoples' Rights (AfCHPR)
For Registered Users and Administrators
Username
Password
Request a new account
Forgot your password?
Login
What can I do in CMIDS?
Once you enter CMIDS, you will be able to:
View all the cases
See case details
Create Reports, Charts and Dashboards
ENTER AS PUBLIC USER
Download CMIDS User Manual
Browser Requirement: Internet Explorer 6.5 or higher.
Powered by IDM 6.5
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Figure 1: CMIDS Login Screen

A successful login directs you to the *My Workspace* module.

You may switch the login screen language of *CMIDS* into any of the languages supported by the application by pressing the link of the language in which you want to present the data in the right upper corner of the screen.

Note: If you have forgotten your password, you can retrieve it by clicking the **Forgot your password?** link in the *Login Screen* and confirming your identity. After submitting your identity information, you will receive a password to the e-mail account indicated.

3.1 Registering a New User

If you are new to the system and you need a personal account, sign up for a username and password to start using the system.

In order to register in the system, follow the steps below:

1. Click the **Request a new account** link in the *Login Screen*. A *User Registration Form* (Figure 2) appears.
2. Fill in the information requested.
3. Click the **Submit** button to submit the inserted information.

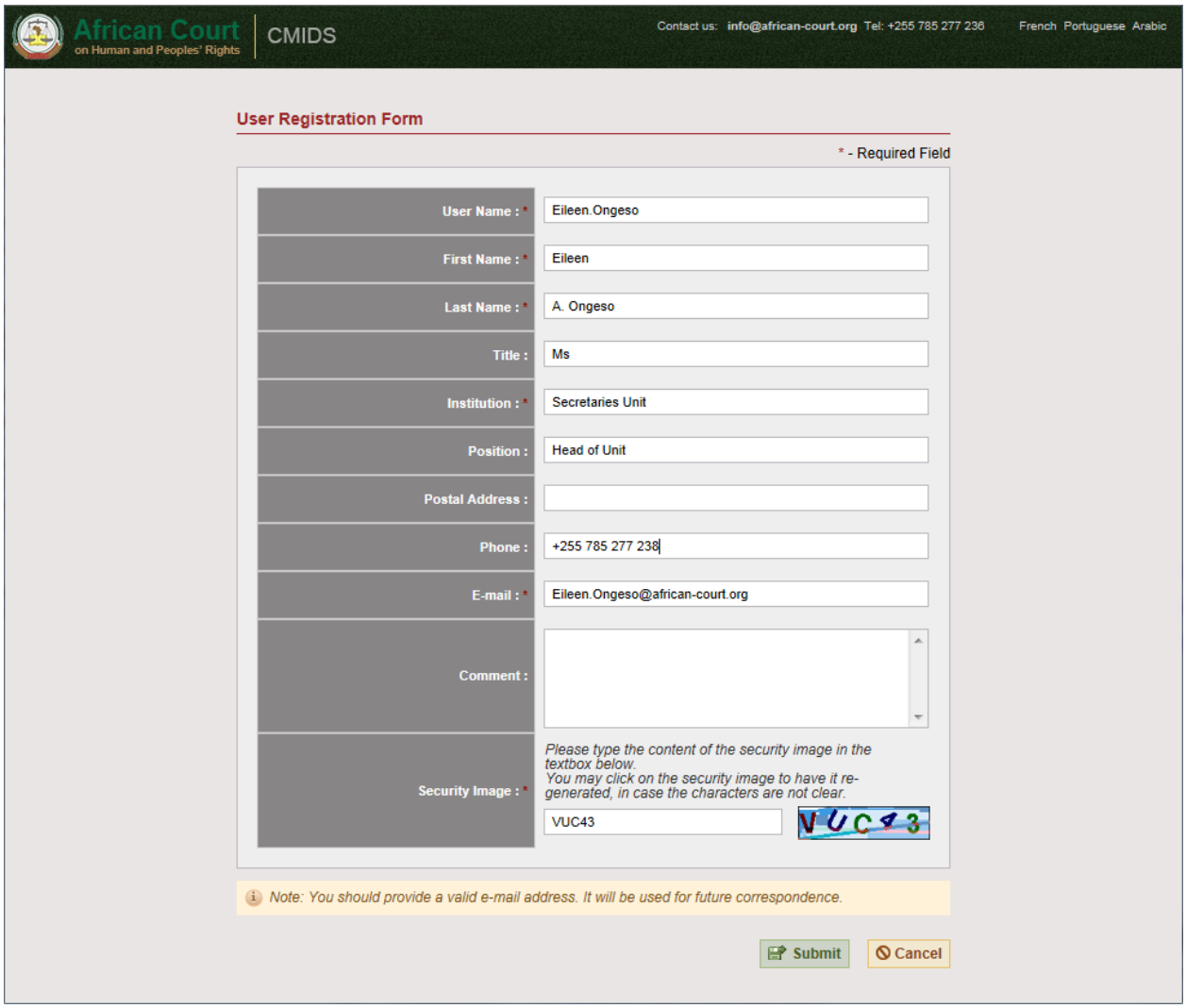


Figure 2: User Registration Form

Once you submit the registration form, the *CMIDS* administrator receives a notification. The administrator will review the information submitted and either approve the application or reject it. In case the application is approved, you will receive an e-mail message to the provided e-mail address. The e-mail will contain your login information details (username and automatically generated password) and the link to the *CMIDS* login page.

Once logged in with the received username/password, you can manage your details, i.e. change personal data and the password. To edit personal details, log into the application, go to the *My Profile* section (Figure 3) and make the appropriate changes.

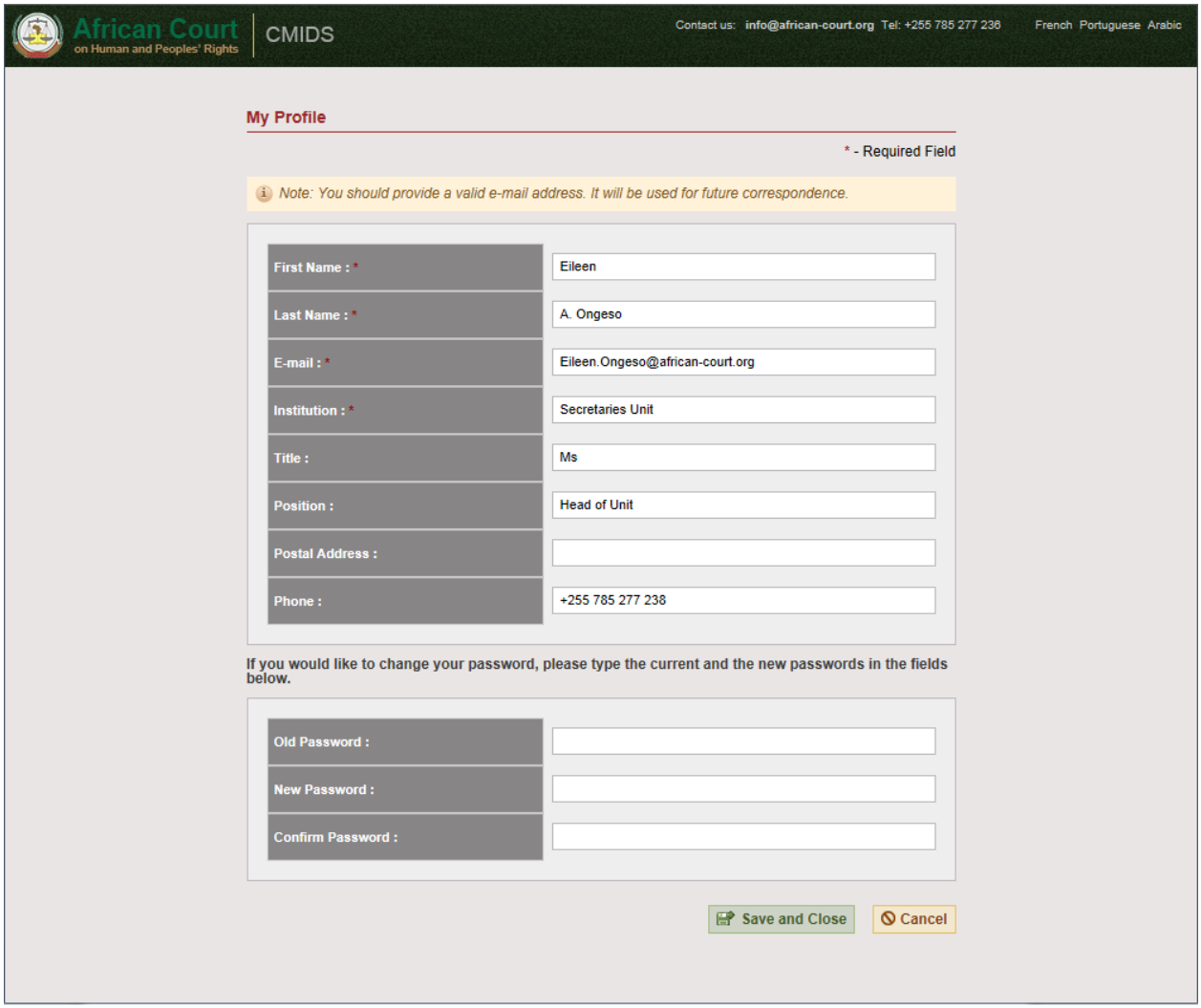


Figure 3: My Profile Section

Note: If you want to change your password, please make sure that the new password is at least 6-16 characters long and contains at least one upper case letter, one lower case letter, and one numeric character.

3.2 Accessing CMIDS without Registration

To ensure more flexibility and to provide access to a wider range of users, the system is designed in such a way that it allows public users to enter it without registration.

Public users wishing to view data should click the **ENTER AS PUBLIC USER** in the *Login Screen* (Figure 1).

4. CMIDS ANALYTICAL INTERFACE STRUCTURE

CMIDS consists of the following main sections:

- MY WORKSPACE MODULE – used for quick access to the cases registered in the system by the particular user or cases that are assigned to the user.
- FIND MODULE – used for quick access to the cases registered in the system based on a pre-defined list of search criteria.
- DASHBOARD MODULE – used for quick access to the projects registered in the system.
- LIST MODULE – used to create and execute ad-hoc queries on the data, and to acquire results in the form of a list.
- CHART MODULE – used to filter and display the data in a chart form.
- MAP MODULE – used to filter and display the data in a map form.
- REPORT MODULE – generates complex reports over one or more criteria and presents the output in the printable and user-friendly format.

The *CMIDS* main window has a complex preview as it is shown in Figure 4.

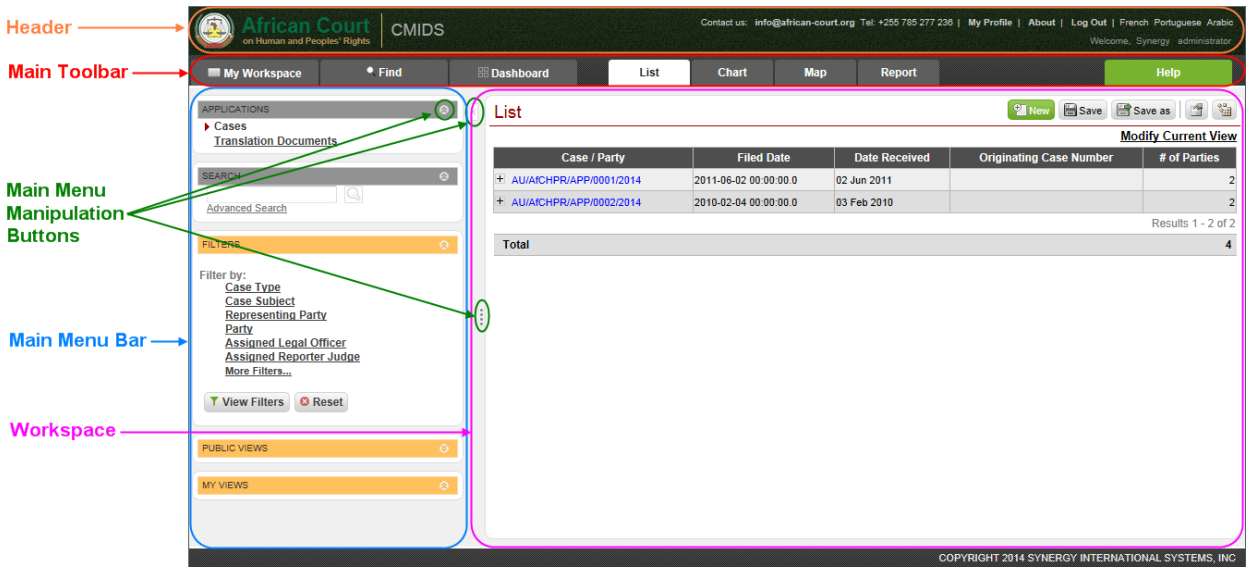


Figure 4: CMIDS Analytical Interface Structure

It contains the following components:

Component Name	Description
Header	This is the application header that contains the application name and logo. On the right side, the following functions are available: • **Contact Us** – presents the contact details (e-mail address and phone number) of the *CMIDS* System Administrator. • **My Profile** –opens your personal settings and details. • **About** – opens the *CMIDS* information window. • **Log Out** – logs the user out of the application. • **French / Portuguese / Arabic** – switches the language of the system to French/Portuguese/Arabic.

Main Toolbar	This is the main toolbar of the *CMIDS* application. The following tabs are available here: • **My Workspace** – opens the MY WORKSPACE MODULE to manage the user related cases. • **Find** – opens the FIND MODULE for quick access to the cases registered in *CMIDS*. • **Dashboard** – opens the DASHBOARD MODULE. • **List** – opens the LIST MODULE. • **Chart** –opens the CHART MODULE. • **Map** – opens the MAP MODULE. • **Report** - opens the REPORT MODULE. • **Help** – opens the *CMIDS* application help.
Main Menu Bar	This menu contains sections with main functions of the *CMIDS* application: • **Applications** – contains the *CMIDS* applications. • **Search** – contains a common and advanced search functions among the selected application list. For details, see SEARCH. • **Filters** – contains filtering options. For details, see FILTERING. • **Public Views/Charts/Maps/Reports** – memorized views / charts / maps / reports (depending on the opened module) available to all users of the application. • **My Views/Charts/Maps/Reports** – memorized views / charts / maps / reports (depending on the opened module) created by and available to the current user only.
Main Menu Manipulation Buttons	• **Left/Right arrows** ( ) – used to hide/open the Main Menu bar. • **Up/Down arrows** ( ) – used to collapse/expand the section in the Main Menu bar. • **Frame Divider** ( ) – used to adjust the width of the Main Menu bar.
Workspace	In this frame, all applications and modules are managed. Here are filtering and search results displayed.

5. MY WORKSPACE MODULE

In the *My Workspace* module (Figure 5) of the *CMIDS* application, you can make use of a personal worksite, designed for you to have a central place to view and manage your content, i.e. the cases and document translation requests that you are in charge of or have access to. The content of this section is live content, generated specifically for each user that is logged in and is determined by what users have access to.

In order to access the *My Workspace* module, click the **My Workspace** tab in the *Main Toolbar* of *CMIDS*. The *My Workspace* section in *CMIDS* consists of two sub-sections, which are:

- **Case** – this section is used to manage the court cases that have been assigned to the user or the ones that the user has been granted with permissions to manage. For more details, see Managing Cases.
- **Document Translation** – this section is used to manage the requests for translation of documents related to the cases recorded in *CMIDS*. For more details, see Managing Document Translation Requests.

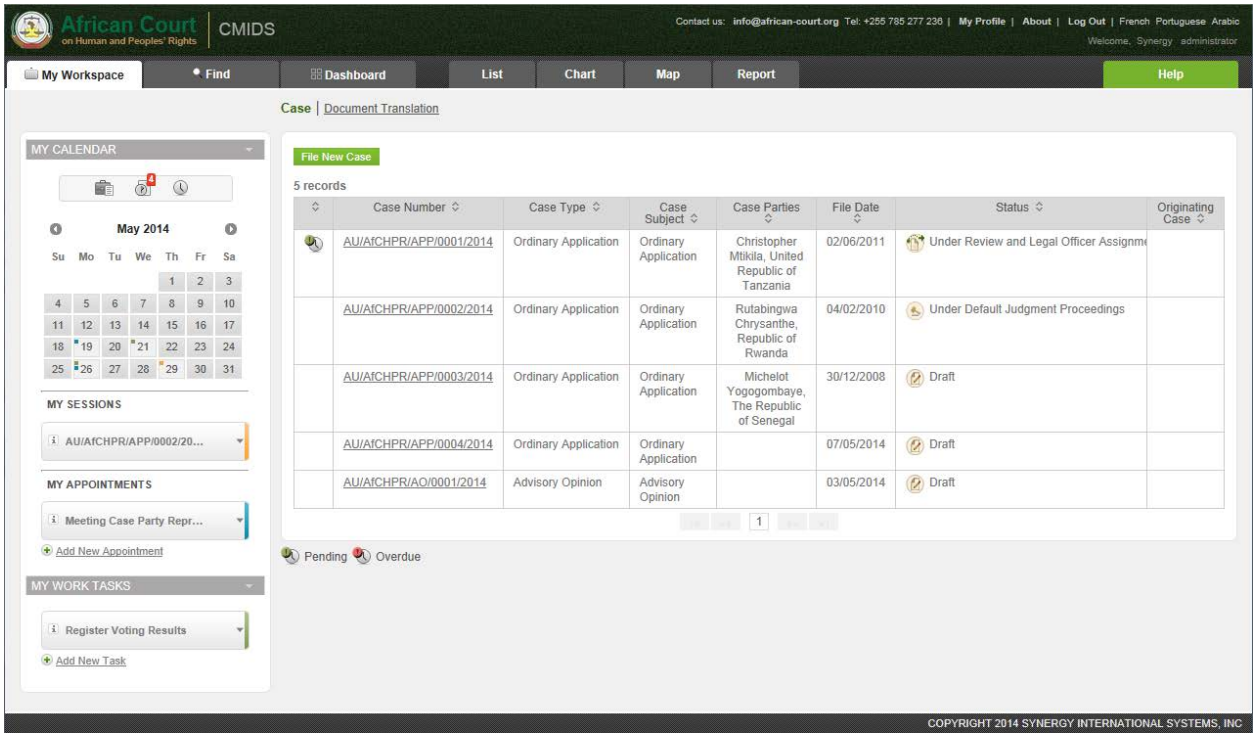


Figure 5: My Workspace Module

Note: Depending on the permissions you have or the role that you play in the case processing workflow, you may have access only to a specific section in the *My Workspace* module. The access permissions to different sections in the *My Workspace* module as well as permissions to add and edit cases or document translation requests are granted and managed from the CMIDS Administration Center (see the *CMIDS Administration Center User Manual* in REFERENCES).

In each of these sections, you can view the details of cases/requests assigned to you as well as edit them; view your schedule on calendar (see My Calendar); view your scheduled

sessions (see My Sessions); create your own appointment and task lists in the My Appointments and My Work Tasks sections respectively (Figure 5).

5.1 Managing Cases

In the *Case* section of the *My Workspace* module (Figure 5), you may see the list of court cases assigned to you or the ones that you have been granted with permissions to manage.

The information displayed in the *Case* section of *My Workspace* module for each case includes the following:

- **Case Number** – the case identification number to be automatically generated by the system as per the subject-specific coding format. The case number is built from several identification numbers, each with a certain meaning. It appears at the top of the form and is not editable by any user.
- **Case Type** – the type of the case.
- **Case Subject** – the subject of the case.
- **Case Parties** – the names of the parties involved in the case.
- **File Date** – the date when the case was filed at the court.
- **Status** – the current state of the case.
- **Originating Case** – the parent case of the corresponding case are displayed in this column. By clicking the parent case number you will be directed to the corresponding case details.

Note: An **Overdue** or **Pending action** icon may appear to the left of the case record signaling that the actions to be performed over the case within a certain period of time are overdue (i.e. the action has not been performed during the specified timeframe) or pending (i.e. the action can still be performed within the specified timeframe). The timeframe during which certain actions should be performed over the case are defined from the Administration Center (see the *CMIDS Administration Center User Manual* in REFERENCES).

In the *Case* section of the *My Workspace* module, you may create a specific court case. For details, see Adding a New Case. There are several types of cases existing in the *CMIDS* application. The lifecycle of a case includes a multi-level processing from case registration, pleading, court proceedings, and final judgment phases. For details on the case processing, see the *CMIDS Case and Document Translation Processing Workflow User Manual* in REFERENCES.

5.1.1 Adding a New Case

Depending on your permissions, you can file new cases.

In order to add a new case from the *My Workspace* module, follow the steps below:

1. Click the **File New Case** button (Figure 6). This will open a new case form.
2. Provide the information requested as it is described in the *CMIDS Case Application User Manual*, see REFERENCES.

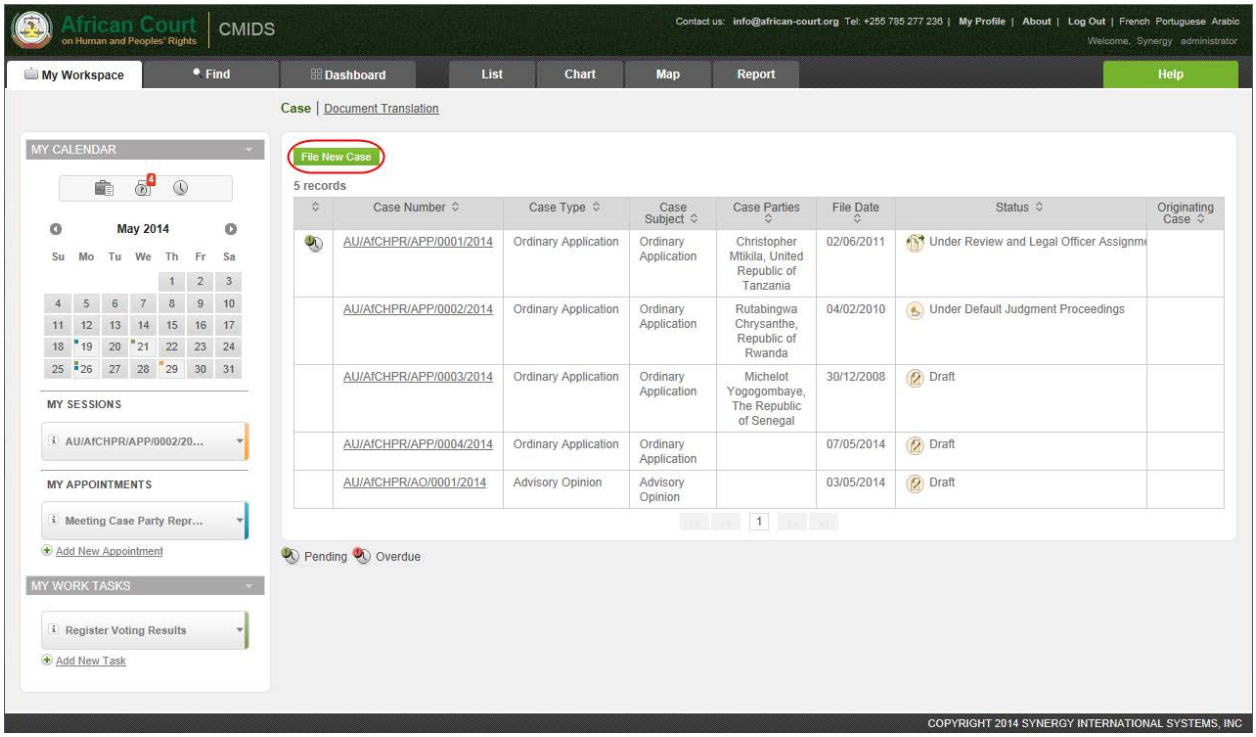


Figure 6: File New Case Button in My Workspace

5.1.2 Viewing Case Details

Depending on your permissions and the current state of the case, you can view the details of the cases that have been filed in the respective court application.

In order to view case details in the *My Workspace* module, click the case number link of the case for which you want to see the details (Figure 5). This will open the case details form. For more information about the information displayed in this section as well the actions that can be performed here, see DETAILS SECTION.

5.1.3 Sorting Cases

The cases displayed in the *Case* section of the *My Workspace* module can be sorted in ascending or descending order according to one of the following criteria:

- **Case Number** – the cases will be sorted in numerical order according to the number that they have been assigned.
- **Case Type** – the cases will be sorted in alphabetical order according to the case type.
- **Case Subject** – the cases will be sorted in alphabetical order according to the case subject.
- **Case Parties -** the cases will be sorted in alphabetical order according to the names of the parties involved into the case.
- **File Date** – the cases will be sorted in chronological order according to the date when they were filed in the court.
- **Status** - the cases will be sorted in alphabetical order according to their current state.
- **Originating Case -** the cases will be sorted in numerical order according to the number of the case that they originate from.

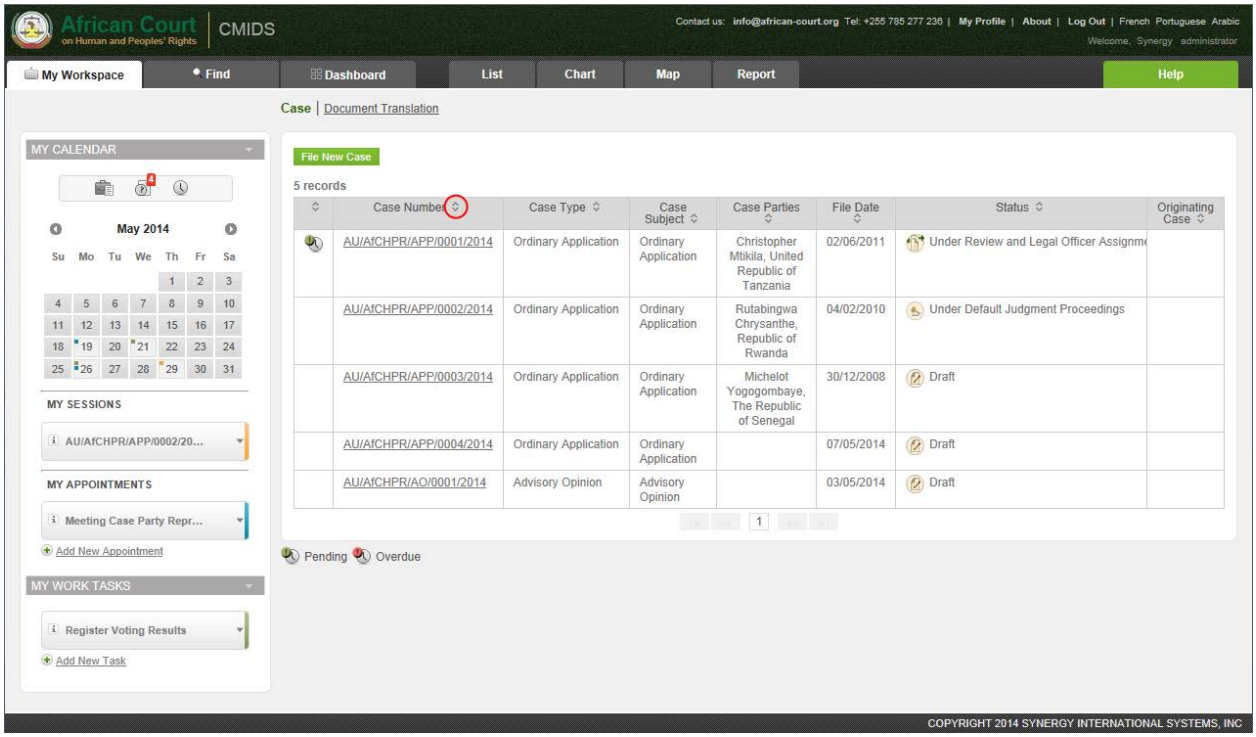


Figure 7: Sorting the Cases

In order to sort the cases according to one of the criteria described above, follow the steps below:

1. Go to the **My Workspace** module.
2. Switch to the **Case** tab.
3. Click the arrow icon in the header of the column that you want to sort the cases by (Figure 7).
4. Click the arrow icon once again to sort the cases in reverse order.

5.2 Managing Document Translation Requests

In the *Document Translation* section of the *My Workspace* module (Figure 8), you may see the list of document translation requests assigned to you or the ones that you have been granted with permissions to manage.

The information displayed in the *Document Translation* section of *My Workspace* module for each document translation request includes the following:

- **Translation Document Number** – the identification number of the document to be translated.
- **Date Filed** – the date when the request for document translation was filed.
- **Deadline** – the date when the document translation is due.
- **Assigned Translator** – the name of the translator that has been assigned to the request.
- **Requesting Person** – the name of the person who has requested document translation.
- **Document Request Number** – the identification number of the document translation request.
- **Status** – the current state of the request.

Note: An **Overdue** or **Pending action** icon may appear to the left of the document translation request record signaling that the actions to be performed over the request within a certain period of time are overdue (i.e. the action has not been performed during the specified timeframe) or pending (i.e. the action can still be performed within the specified timeframe). The timeframe during which certain actions should be performed over the request are defined from the Administration Center (see the *CMIDS Administration Center User Manual* in REFERENCES).

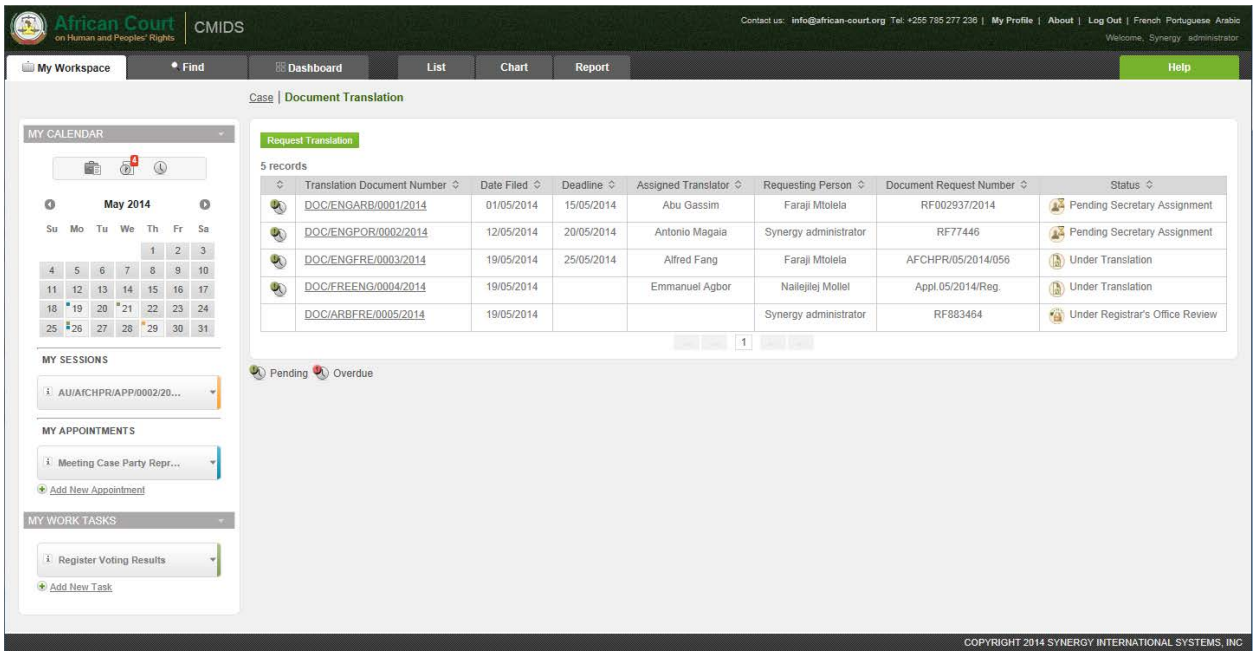


Figure 8: Document Translation Section in My Workspace

In the *Document Translation* section of the *My Workspace* module, you may create a new request. For details, see Adding a New Document Translation Request. The lifecycle of a request includes a multi-level processing from request registration, translation, and final review phases. For details on the request processing, see the *CMIDS Case and Document Translation Processing Workflow User Manual* in REFERENCES.

5.2.1 Adding a New Document Translation Request

Depending on your permissions, you can file new document translation requests for the selected court.

In order to add a new request from the *My Workspace* module, follow the steps below:

1. Click the **Request Translation** button (Figure 9). This will open a new document translation request form.
2. Provide the information requested as it is described in the *CMIDS Document Translation Application User Manual*, see REFERENCES.

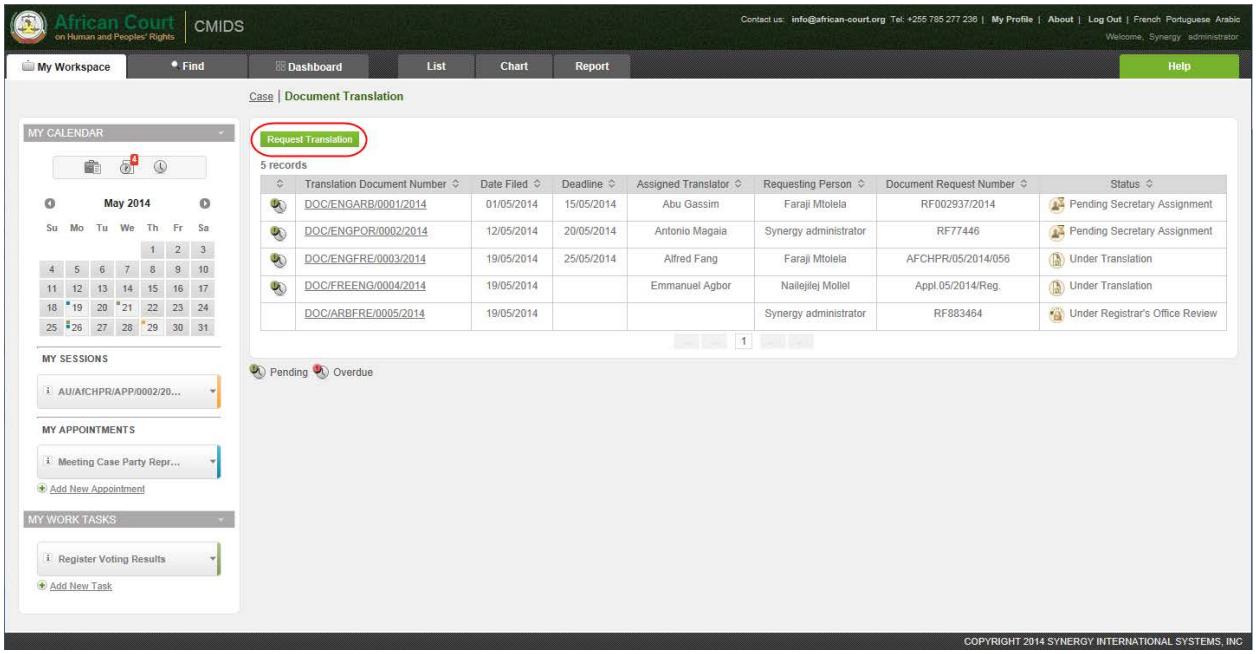


Figure 9: Request Translation Button in My Workspace

5.2.2 Viewing Request Details

Depending on your permissions and the current state of the document translation request, you can view the details of the requests that have been filed in the respective court application.

In order to view request details in the *My Workspace* module, click the translation document number link of the request for which you want to see the details (Figure 8). This will open the request details form. For more information about the information displayed in this section as well the actions that can be performed here, see DETAILS SECTION.

5.2.3 Sorting Document Translation Requests

The requests displayed in the *Document Translation* section of the *My Workspace* module can be sorted in ascending or descending order according to one of the following criteria:

- **Translation Document Number** – the requests will be sorted in numerical order according to the document number that they have been assigned.
- **Date Filed** – the requests will be sorted in chronological order according to the date when they were filed.
- **Deadline** – the requests will be sorted in chronological order according to the date when the translation is due.
- **Assigned Translator -** the requests will be sorted in alphabetical order according to the name of the translator that the document is assigned to.
- **Requesting Person** – the requests will be sorted in alphabetical order according to the name of the person who has requested the document translation.
- **Document Request Number -** the requests will be sorted in numerical order according to the number of the document translation request.
- **Status** - the requests will be sorted in alphabetical order according to their current state.

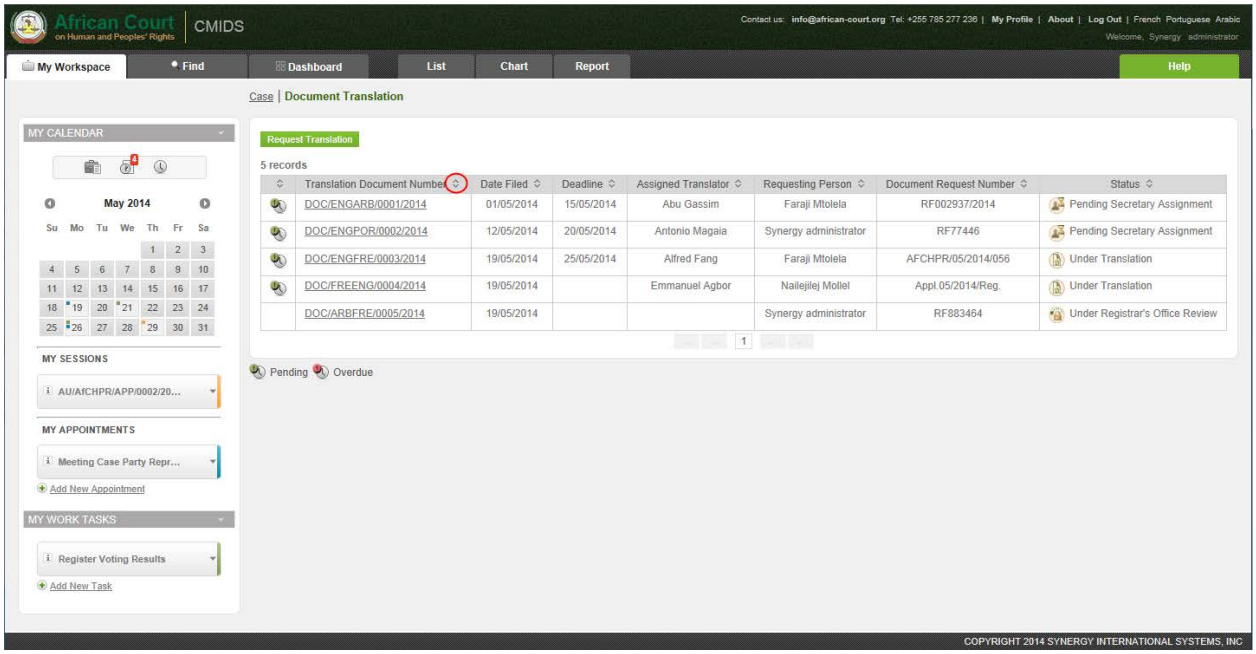


Figure 10: Sorting the Document Translation Requests

In order to sort the requests according to one of the criteria described above, follow the steps below:

1. Go to the **My Workspace** module.
2. Switch to the **Document Translation** tab.
3. Click the arrow icon in the header of the column that you want to sort the requests by (Figure 10).
4. Click the arrow icon once again to sort the requests in reverse order.

5.3 My Calendar

CMIDS provides users with a facility for easy and quick searching among all sessions, appointments, and tasks. This is done through a simple calendar control that can handle scheduling of appointments and tasks as well as display an automatically generated list of cases assigned to you.

In the *My Calendar* section, you can view your working schedule on calendar and all the important information to be used for better and efficient management of the cases and the system (Figure 11).

Click the date on the calendar to see the information provided for the selected date. This may include sessions scheduled to take place on the selected date (see My Sessions), appointments to be held (see My Appointments) or tasks to be performed (see My Work Tasks).

Note: For better visualization, each of these events will be represented with a square of its own color on the calendar date when they are supposed to commence or take place. This way, newly assigned cases will be marked with yellow squares, while the sessions/appointments/tasks and available actions will be marked with orange, blue and green squares respectively.

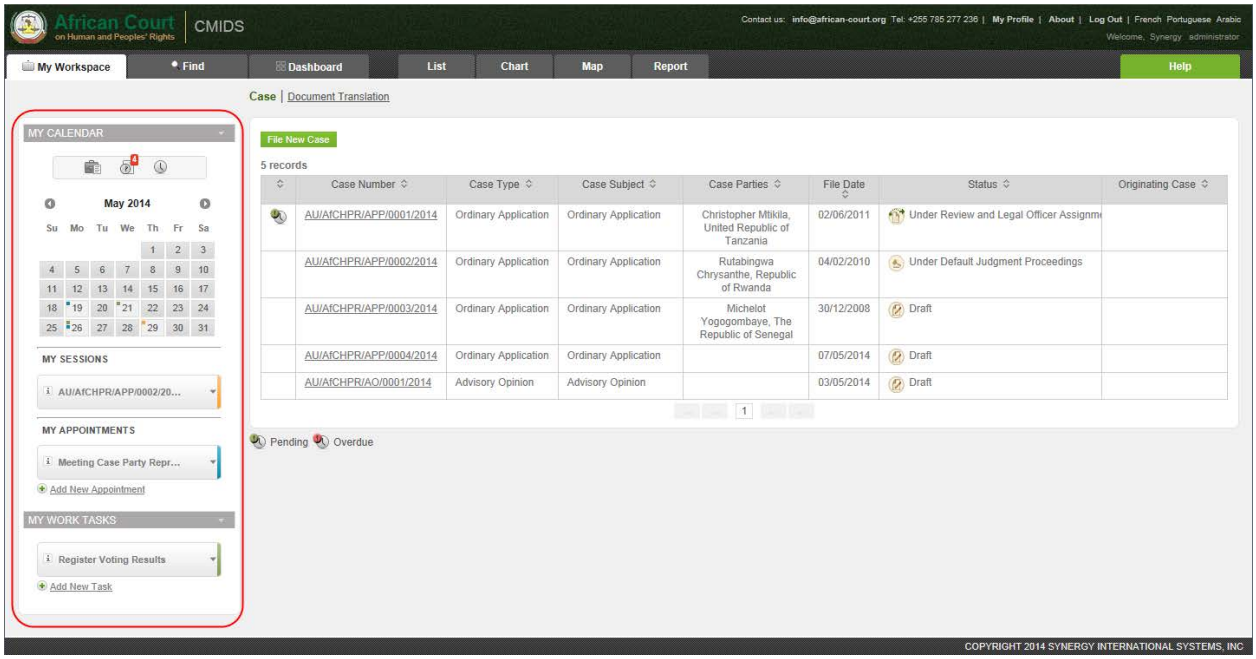


Figure 11: My Calendar in My Workspace

My Calendar is further enhanced with a notification bar (Figure 12), which is intended to inform you, present to you, and bring into your attention the important information to be used for better and efficient management of the cases. The notification bar is used to display information about the newly assigned cases, appointments and tasks as well as actions pending for your cases. Each item comprising the notification bar also shows the number of newly created case-related events right on the top of the item as shown in the screenshot below. These items are: *Assigned Cases*, *Sessions/Appointments/Tasks* and *Available Actions*.

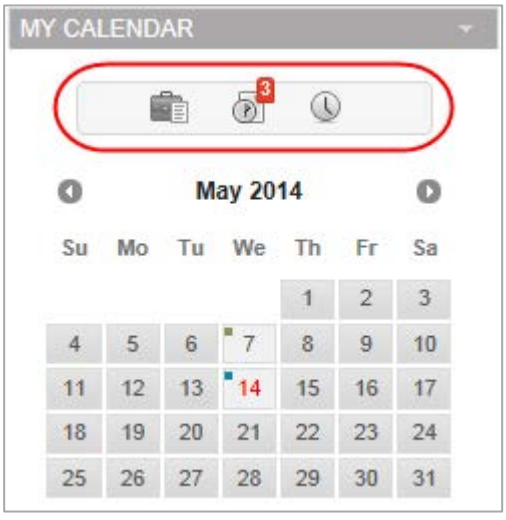


Figure 12: Notification Bar of My Calendar

Moreover, the notification bar items display detailed information about the respective case-related event when you click on it (Figure 13).

Figure 13: Viewing Event Details

Depending on the type of event selected, you will be able to view the following information on the events listed:

For *Assigned Cases*:

- **Case Number** – this is an automatically generated number assigned to the case for reference and identification.
- **Date** – this is the date when the case was assigned to the Judge.

For *Sessions/Appointments/Tasks*:

- **Subject** – this is the subject given to the session / appointment / task during its creation.
- **Date** – this is the date when the appointment or task was created.

For *Available Actions*:

- **Case Number** – this is the number of the case that has a pending action for it.
- **Date** – this is the date when the notification was created.
- **Action** – this is the action that needs to be performed over the case.

5.4 My Sessions

The *My Workspace* module of the *CMIDS* application provides you with an opportunity to view the list of cases assigned to you and scheduled to have sessions on a specific date (Figure 14).

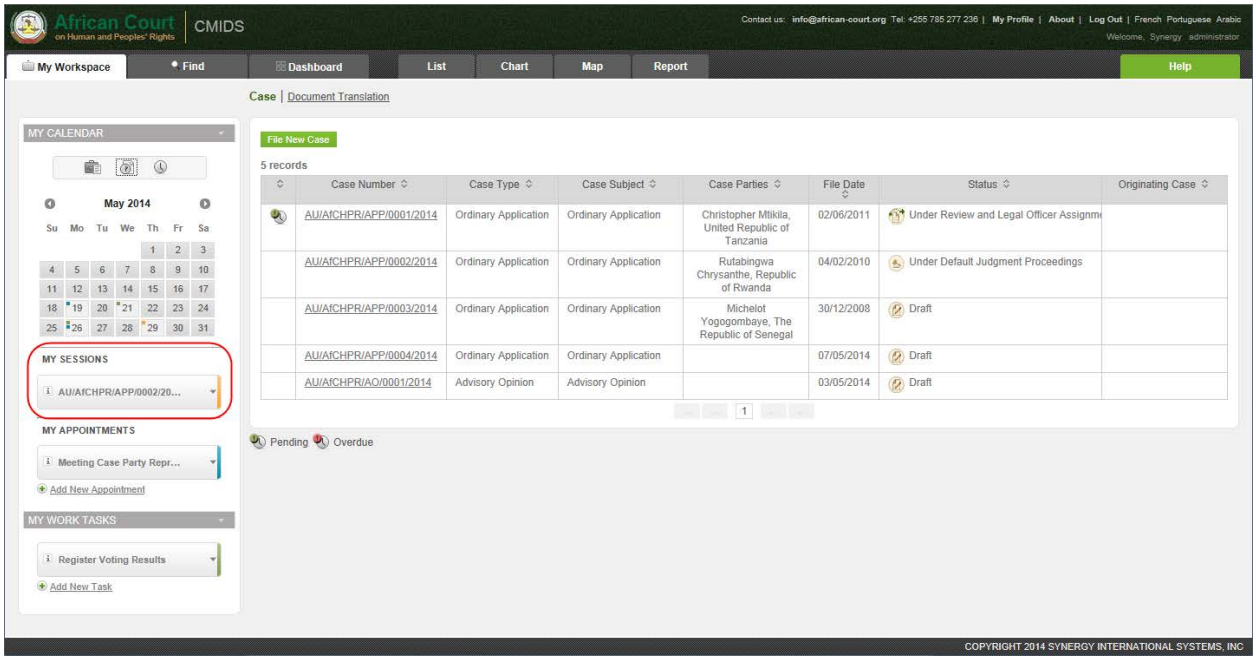


Figure 14: My Sessions in My Workspace

In order to review the information provided for a session from the *My Sessions* section, click the date on the calendar to see the session appointments scheduled for you on the selected date.

For details on the case processing and the states that a case can have, see the *CMIDS Case Processing Workflow User Manual* in REFERENCES.

5.4.1 Viewing Session Details

In order to review the information provided for a case hearing from the *My Sessions* section, select the date on the calendar that have a case hearing scheduled for you and then click the arrow to the right of the selected record and select the **(View)** option. This will open the case hearing details (Figure 15).

Note: You can use the **(Info)** option to the left of the selected record to see brief information about the case hearing.

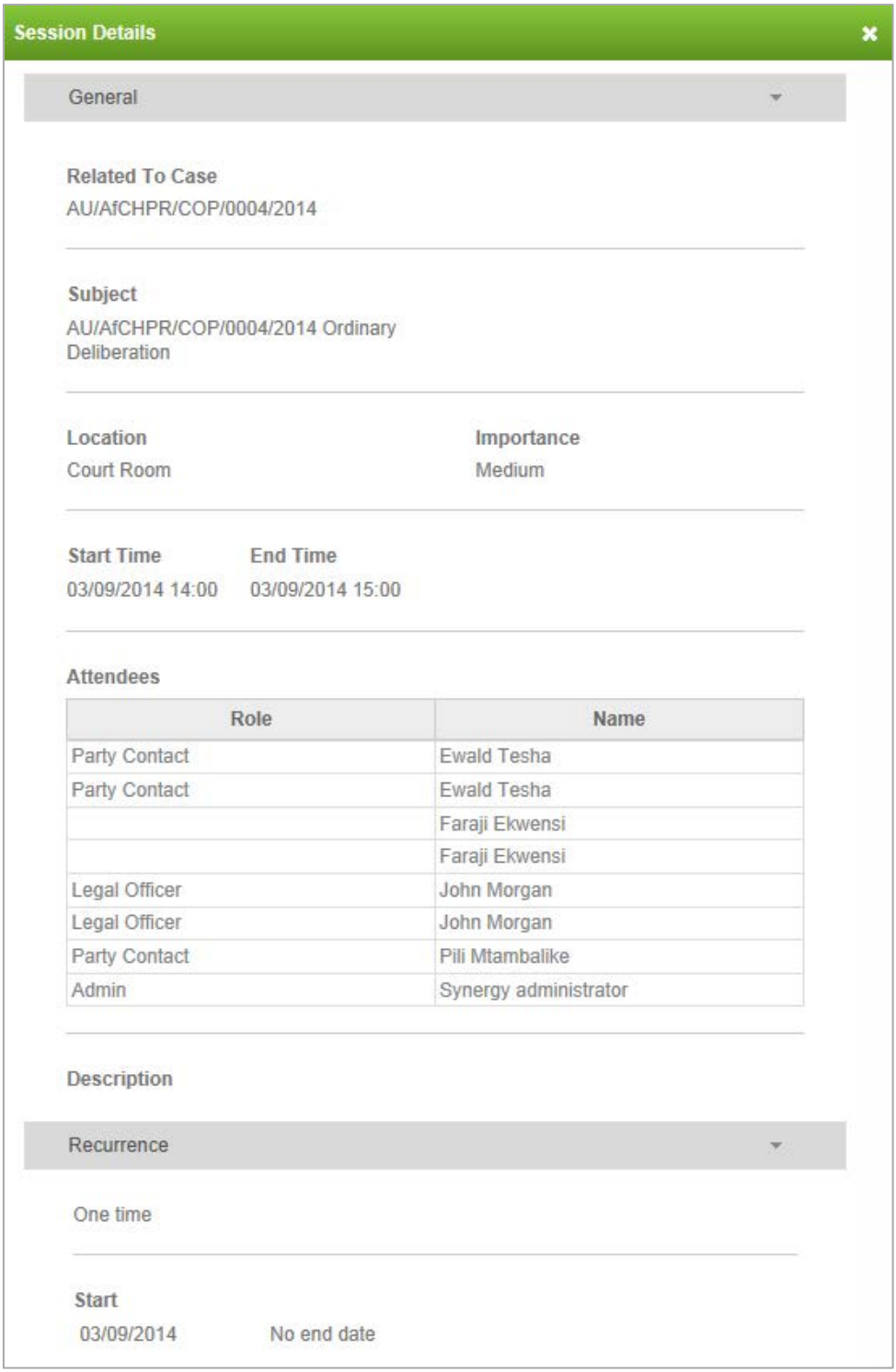


Figure 15: Viewing Session Details

The information provided in the *General* and *Recurrence* sections of this form is described in the table below:

Field Name	Description
Related to Case	Provides the court case to which the appointment is related.
Subject	Provides a one-line synopsis of the purpose that the session has.

Location	Specifies the appointment location.
Importance	Specifies the appointment priority.
Start Time	Specifies the date and time when the appointment is supposed to begin.
End Time	Specifies the date and time when the appointment is supposed to end.
Attendees	Specifies the persons that will attend the appointment.
Description	Provides the appointment description, if any.
One time	Specifies the appointment recurrence.
Start	Specifies the date when the appointment is supposed to start.

5.5 My Appointments

The *My Workspace* module of the *CMIDS* application provides you with a possibility of creating your own list of appointments.

This chapter outlines how to view, add, edit and delete appointments for the selected court.

5.5.1 Adding a New Appointment

In order to add a new appointment from the *My Workspace* module, follow the steps below:

1. Click the **Add New Appointment** link in the *My Appointments* section (Figure 16). This will open a new appointment adding form (Figure 17).

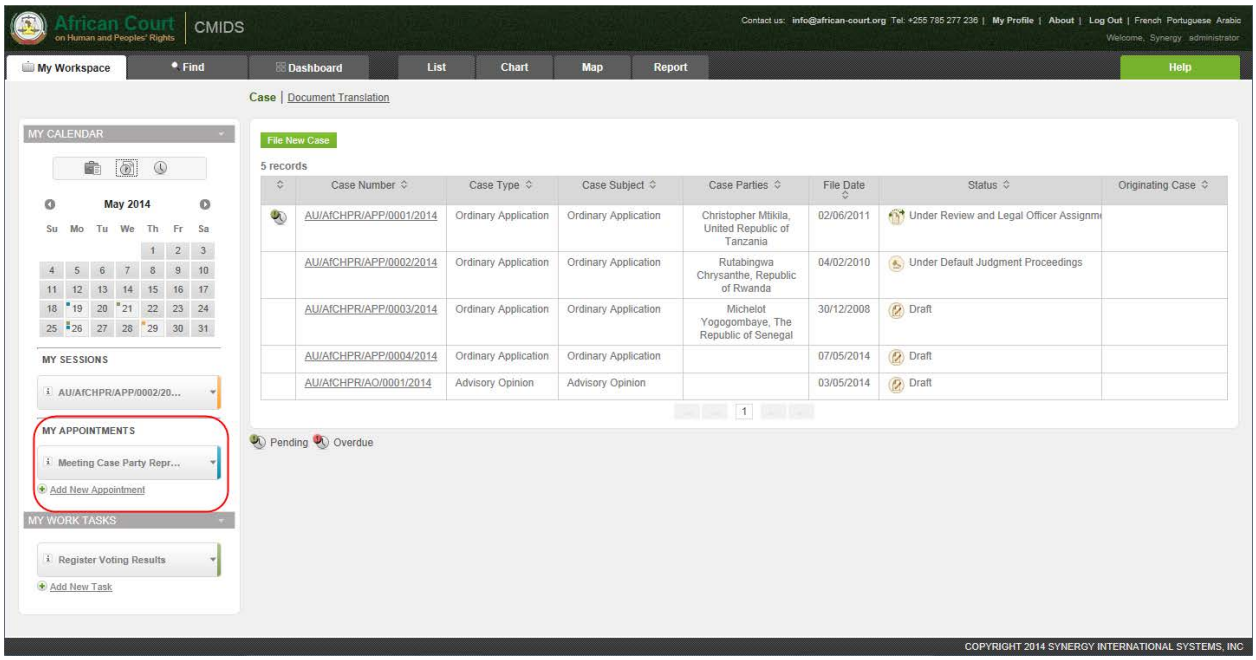


Figure 16: Adding a New Appointment in My Workspace Module

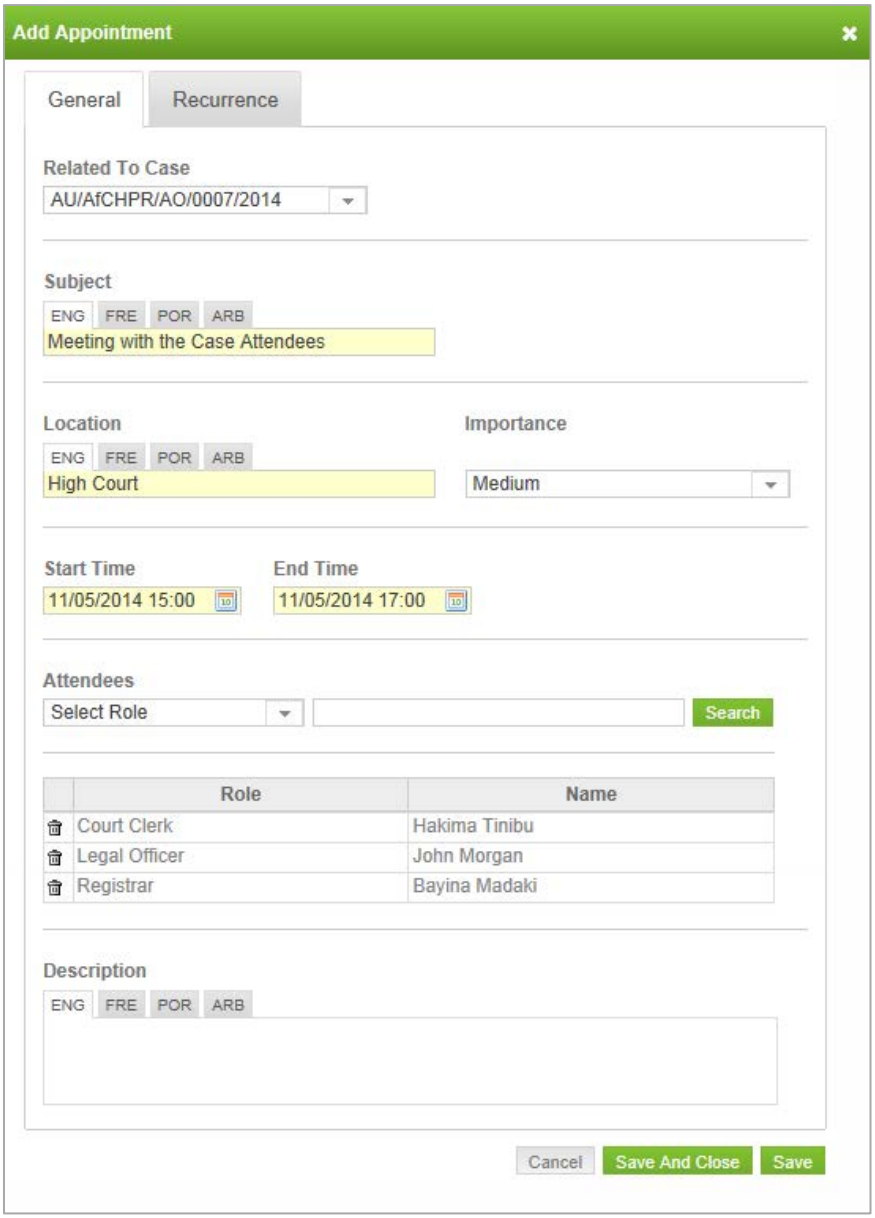


Figure 17: Add Appointment Form: General Section

2. Provide the *General* information requested as described in the table below:

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Description
Related to Case	Indicate the court case to which the appointment is related.
Case Subject	Provide a one-line synopsis of the purpose that the appointment has in the English, French, Portuguese, and Arabic languages. *This field is mandatory.*
Location	Specify the appointment location in the English, French, Portuguese, and Arabic languages.
Importance	Specify the appointment priority. The following options are available:

	• Low • High • Medium
Start Time	Specify the date and time when the appointment is supposed to begin. *This field is mandatory.* A calendar popup is available for the date input, see Figure 22: Calendar.
End Time	Specify the date and time when the appointment is supposed to end. *This field is mandatory.* A calendar popup is available for the date input, see Figure 22: Calendar.
Attendees	Indicate the persons that will attend the appointment by selecting their role and typing the search criteria to locate them. *This field is mandatory*. Clicking the **Search** button will display all available case participants. Click the **Add** button to the left of the selected attendee name to schedule the appointment.
Description	Provide the appointment description, if any, in the English, French, Portuguese, and Arabic languages.

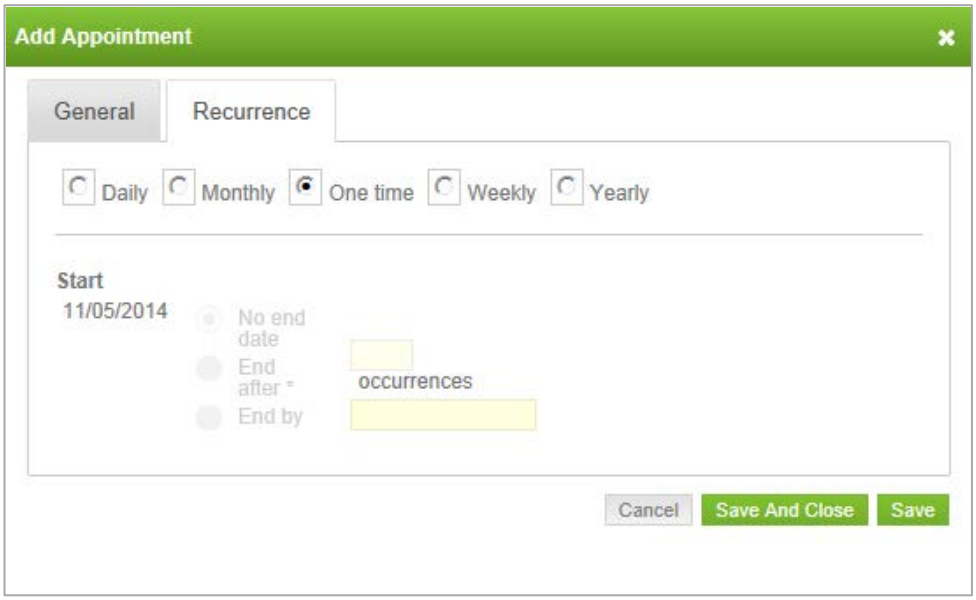


Figure 18: Add New Appointment Form: Recurrence Section

3. Provide the *Recurrence* information requested as described in the table below (Figure 18):

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Description
Appointment Recurrence	Specify the appointment recurrence. The following options are available: • Daily

	• Monthly • One time • Weekly • Yearly
Appointment End Information	Specify when the appointment is supposed to end. The following options are available: • No end date • End after (a number of) occurrences (is unavailable for one time recurrence) • End by (date) *The End after field is mandatory*. A calendar popup is available for the date input, see Figure 22: Calendar.

4. Click the **Save** button to save the information input. Or, click the **Save and Close** button to save the information input and return to MY WORKSPACE MODULE.

5.5.2 Editing Appointment Details

In order to edit the information provided for an appointment, follow the steps below:

1. Select the date on the calendar to see the appointments scheduled for the selected date.
2. Click the arrow to the right of the selected appointment record.
   Note: You can use the **(Info)** option to the left of the selected record to see brief information about the appointment.
3. Select the **(Edit)** option. You will be directed to the appointment form where the information provided for the selected appointment will display.
4. Make the appropriate changes.
5. Click the **Save** button to save the information input. Or, click the **Save and Close** button to save the information input and return to MY WORKSPACE MODULE.

5.5.3 Viewing Appointment Details

In order to review the information provided for an appointment, follow the steps below:

1. Click the date on the calendar to see the appointments scheduled for the selected date.
2. Click the arrow to the right of the selected record and select the **(View)** option. This will open the appointment details window.

Note: You can use the **(Info)** option to the left of the selected record to see brief information about the appointment.

5.5.4 Removing Appointments

To remove an existing appointment, follow the steps below:

1. Click the date on the calendar to see the appointments scheduled for the selected date.

2. Click the arrow to the right of the selected record and select the ✖ **(Delete)** option.

5.6 My Work Tasks

The *My Workspace* module of the *CMIDS* application provides you with the possibility of creating your own list of tasks.

This chapter outlines how to add, edit and delete work tasks for the selected court.

5.6.1 Adding a New Task

In order to add a new task from the *My Workspace* module, follow the steps below:

1. Click the **Add New Task** link in the *My Work Tasks* section (Figure 19). This will open a new work task adding form (Figure 20).

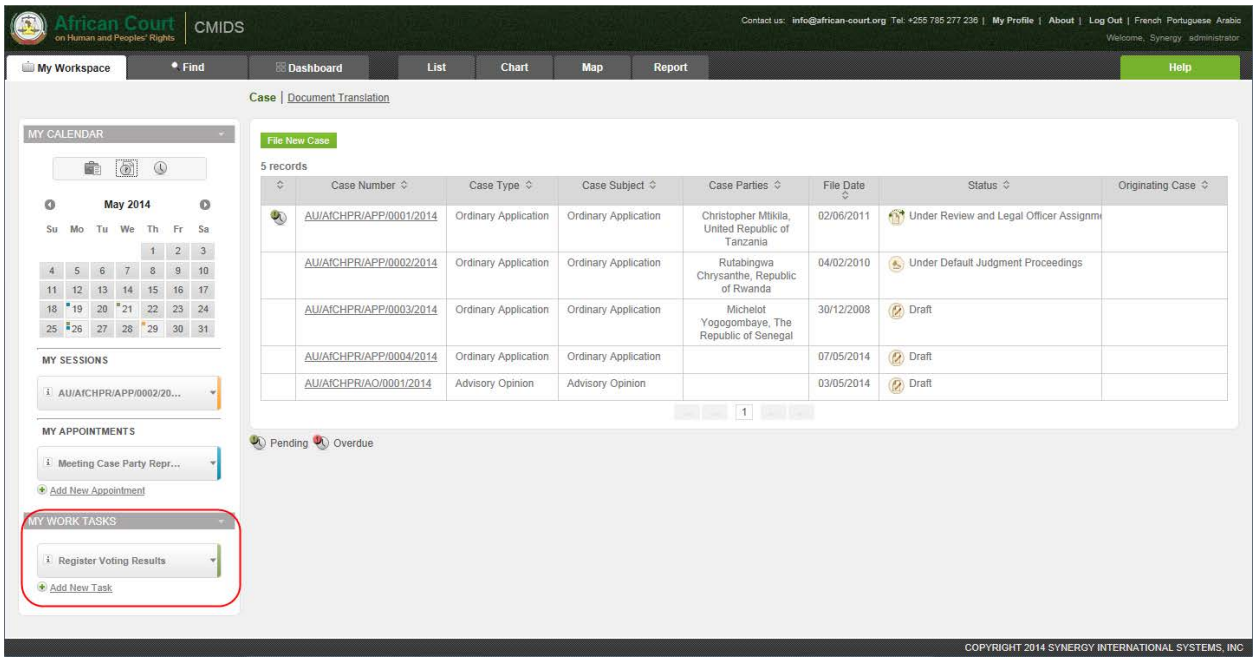


Figure 19: Adding a New Task in My Workspace

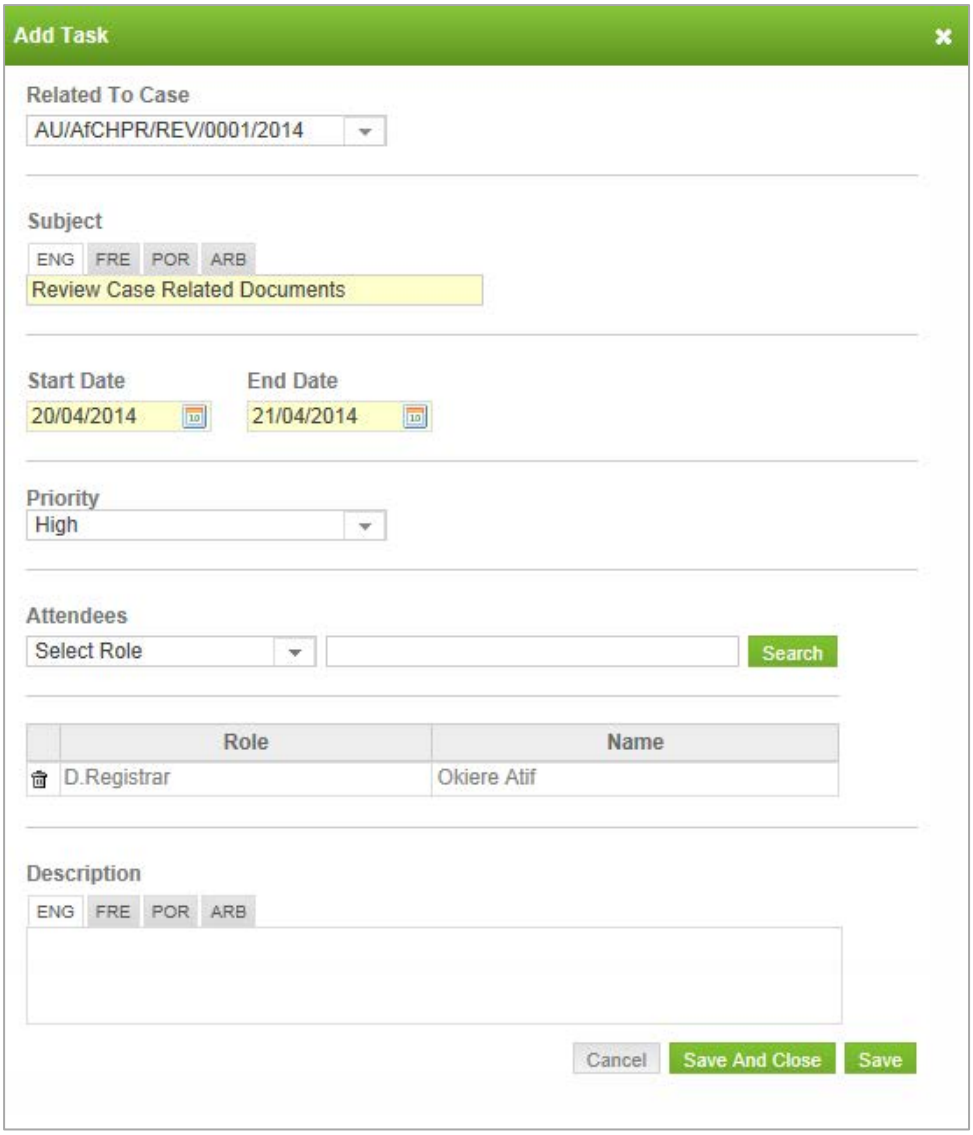


Figure 20: Add New Work Task Form

2. Provide the information requested as described in the table below:

Note: Some fields in this section are mandatory to be filled in. They are marked with an asterisk.

Field Name	Description
Related to Case	Indicate the court case to which the work task is related.
Case Subject	Provide a one-line synopsis of the work task in the English, French, Portuguese, and Arabic languages. *This field is mandatory.*
Start Date	Specify the date when the work task is supposed to start. *This field is mandatory.* A calendar popup is available for this input, see Figure 22: Calendar.
End Date	Specify the date when the work task is supposed to end. *This field is mandatory.* A calendar popup is available for this input, see Figure 22: Calendar.
Priority	Specify the task priority. The following option are

	available: • Low • High • Medium
Attendees	Indicate the persons that will participate in implementing the task by selecting their role and typing the search criteria to locate them. *This field is mandatory*. Clicking the **Search** button will display all available case participants. Click the **Add** button to the left of the selected attendee name to schedule the task.
Description	Provide the task description, if any, in the English, French, Portuguese, and Arabic languages.

3. Click the **Save** button to save the information input. Or, click the **Save and Close** button to save the information input and return to MY WORKSPACE MODULE.

5.6.2 Editing Task Details

In order to edit the information provided for a work task, follow the steps below:

1. Select the date on the calendar to see the tasks scheduled for the selected date.
2. Click the arrow to the right of the selected task record.
   Note: You can use the **(Info)** option to the left of the selected record to see brief information about the work task.
3. Select the **(Edit)** option. You will be directed to the work task form where the information provided for the selected task will display.
4. Make the appropriate changes.
5. Click the **Save** button to save the information input. Or, click the **Save and Close** button to save the information input and return to MY WORKSPACE MODULE.

5.6.3 Viewing Task Details

In order to review the information provided for a task, follow the steps below:

1. Click the date on the calendar to see the tasks scheduled for the selected date.
2. Click the arrow to the right of the selected record and select the **(View)** option. This will open the work task details window.

Note: You can use the **(Info)** option to the left of the selected record to see brief information about the task.

5.6.4 Removing Tasks

To remove an existing task from the *My Work Tasks* list, follow the steps below:

1. Click the date on the calendar to see the tasks scheduled for the selected date.
2. Click the arrow to the right of the selected record and select the **(Delete)** option.

6. FIND MODULE

The *CMIDS* application provides users with a facility for easy and quick searching among all cases and document translation requests that are available in the system (Figure 21).

In order to access the *Find* module of the system, click the **Find** tab in the *Main Toolbar* of *CMIDS*. This will navigate you to the *Find* module. The *Find* module in *CMIDS* consists of two sub-sections, which are:

- **Case** – this sub-section is used for searching among the cases recorded in the *CMIDS* application. For more details, see Defining Case Search Criteria.
- **Document Translation** - this sub-section is used for searching among the document translation requests recorded in the *CMIDS* application. For more details, see Defining Request Search Criteria.

In this module, you can locate the cases and document translation requests you are looking for by applying some search criteria to the list of cases / requests displayed on the screen. This will narrow down the data on the screen and make it easier to find the information that you are looking for.

6.1 Defining Case Search Criteria

You may perform search among the cases in the *Find* module by specifying one or more search criteria under the respective section in the left-side panel, and results will appear in the right-side panel (Figure 21).

The following search criteria are available:

- **Type** – used to search the cases by type.
- **Subject** – used to search the cases by subject.
- **Status** – used to search the cases by status.
- **Search For** – used to search the cases by keywords. In order to find a case by a keyword, follow the steps below:
  - Provide the keyword to search by.
  - Define the field to **Search in**. To do that, select the appropriate field(s) in the *Search In* list by checking the respective checkbox(es). You may select multiple fields.
- **Filed on (from) / Filed on (to)** – used to filter the cases by the date or the range of dates when the case was filed. A calendar pop-up is available for these fields, see Figure 22: Calendar.
- **Updated on (from) / Updated on (to)** – used to filter the cases by the date or the range of dates when the case was updated. A calendar pop-up is available for these fields, see Figure 22: Calendar.

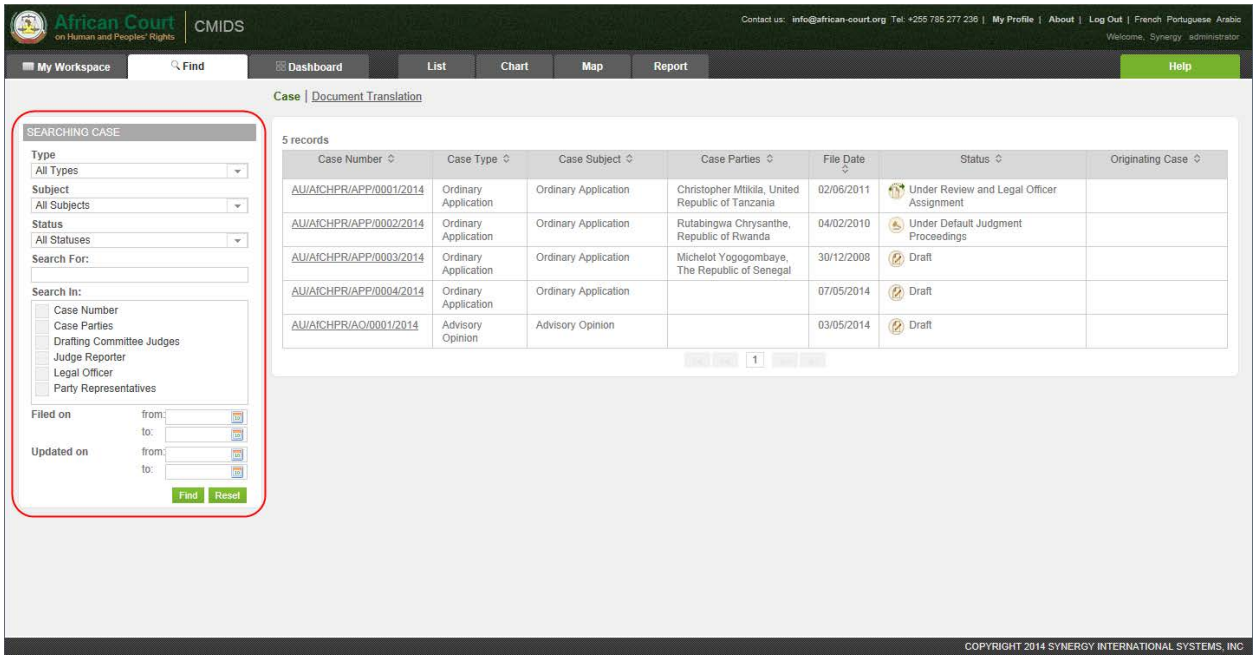


Figure 21: Find Cases Sub-section

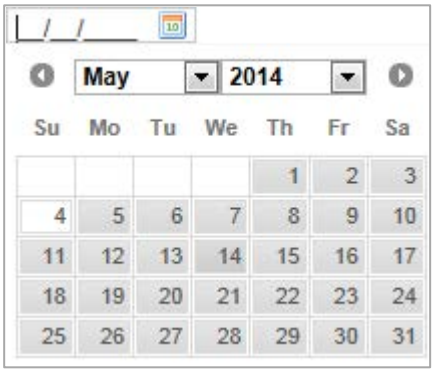


Figure 22: Calendar

Once one or more criteria are selected (Figure 21), press **Find** to see the filtered list of cases.

To clear all search criteria previously selected for the list of cases, press the **Reset** button.

To view the case details in the *Find* module, click the case number link of the case for which you want to see the details (Figure 21). This will open case details. For more information, see DETAILS SECTION.

Note: A more advanced search mechanism is available under the *List*, *Chart*, *Map,* and *Report* modules of *CMIDS*. It allows retrieving results based on all fields that are captured and recorded through the system.

6.2 Defining Request Search Criteria

You may perform search among the cases in the *Find* module by specifying one or more search criteria under the respective section in the left-side panel, and results will appear in the right-side panel (Figure 23).

The following search criteria are available:

- **Status** – used to search the document translation requests by status.
- **Source Language** - used to search the document translation requests by the original language the document comes in.
- **Target Language** - used to search the document translation requests by the language the document is translated into.
- **Search For** – used to search the document translation requests by keywords. In order to find a request by a keyword, follow the steps below:
  - Provide the keyword to search by.
  - Define the field to **Search in**. To do that, select the appropriate field(s) in the *Search In* list by checking the respective checkbox(es). You may select multiple fields.
- **Filed on (from) / Filed on (to)** – used to filter the document translation requests by the date or the range of dates when the request was filed. A calendar pop-up is available for these fields, see Figure 22: Calendar.
- **Deadline (from) / Deadline (to) -** used to filter the document translation requests by the date or the range of dates when the translation was due. A calendar pop-up is available for these fields, see Figure 22: Calendar.
- **Updated on (from)/ Updated on (to)** – used to filter the document translation requests by the date or the range of dates when the request was updated. A calendar pop-up is available for these fields, see Figure 22: Calendar.

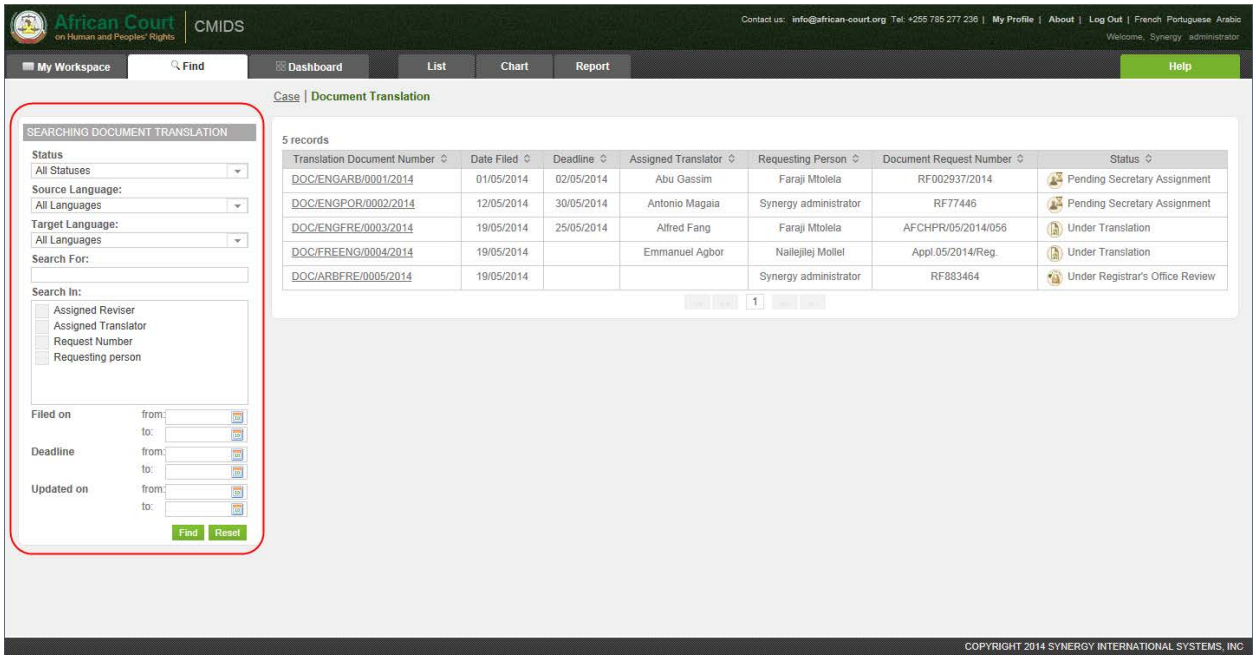


Figure 23: Find Document Translation Sub-section

Once one or more criteria are selected (Figure 23), press **Find** to see the filtered list of document translation requests.

To clear all search criteria previously selected for the list of requests, press the **Reset** button.

To view the request details in the *Find* module, click the translation document number link of the request for which you want to see the details (Figure 23). This will open case details. For more information, see DETAILS SECTION.

Note: A more advanced search mechanism is available under the *List* and *Report* modules of *CMIDS*. It allows retrieving results based on all fields that are captured and recorded through the system.

7. DASHBOARD MODULE

Reporting requirements have changed dramatically over the past few years. Nowadays, it is not enough to be able to produce a report to analyze data, but it is more essential to have a reporting tool that will allow for a visual display of the most important information consolidated and arranged on a single screen so that real-time data can be monitored at a glance.

As a comprehensive reporting tool, *CMIDS* removes the limitations on report development giving the possibility to view various types of reports such as lists, maps, and charts displayed in a user-friendly environment on a dashboard. Unlike 'regular' reports, dashboards provide visual, at a glance insight into the data to be analyzed, thus giving the decision-makers the possibility to leverage information assets in real-time through visually rich, responsive and personalized business intelligence dashboards. This way, they will achieve better data interpretation and, as a result, more informed decision making.

7.1 Key Features

You can make use of the following key features of the *Dashboard* tool in *CMIDS*:

- ✓ An intuitive drag-and-drop environment that turns adding reports to a dashboard into an easily manageable task.
- ✓ Fully resizable report windows.
- ✓ Better visualization of the information presented in graph reports.
- ✓ The ability to print reports for future reference.
- ✓ The ability to export reports on the dashboard in MS Word, MS Excel, and Adobe PDF formats.

7.2 Accessing the Dashboard Module

In order to access the *Dashboard* module of the system, you should click the **Dashboard** tab. This will navigate you to the *Dashboard* module. In this module, you can create dashboards, include reports under them, etc.

7.3 Main Screen and Its Components

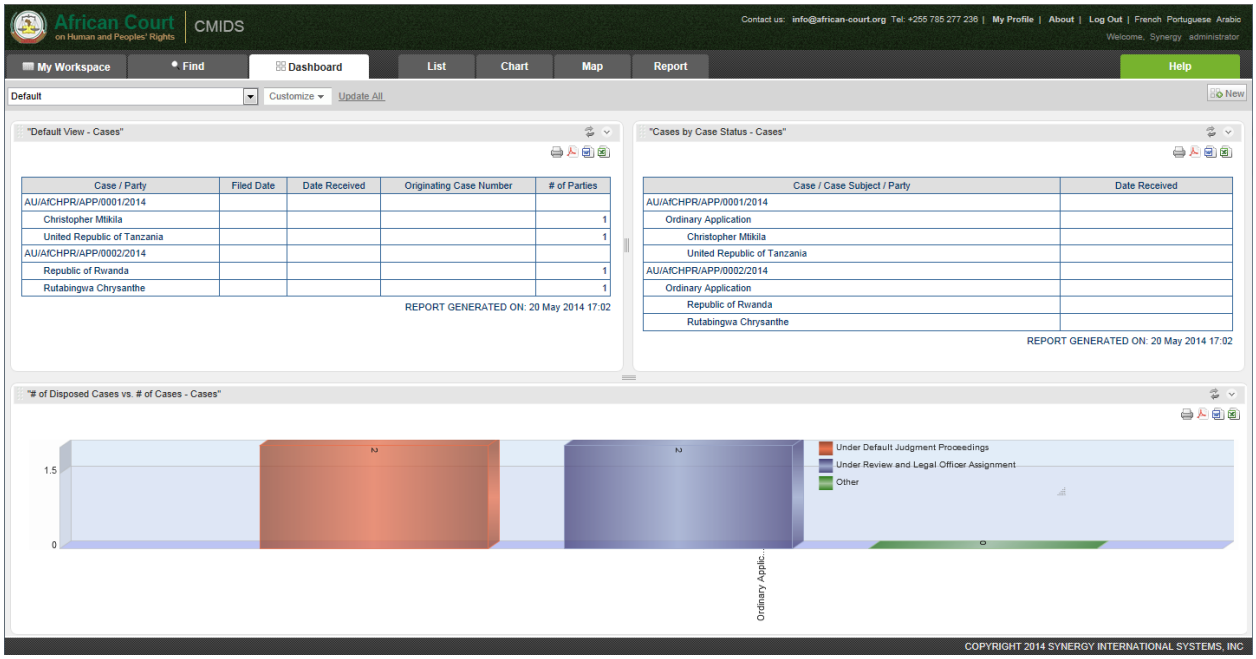


Figure 24: Dashboard Module

- **Dashboard Selector -** contains a list of pre-defined dashboards. By choosing a definite dashboard from this list, you can view the reports stored in the selected dashboard.

- **Customize -** allows performing the following operations:
  - ***Name* -** displays the dashboard name.
  - ***Save* -** saves a dashboard so that it can be shared with other users.
  - ***Save as New* -** saves a dashboard as a new one. This option is especially useful if you need to make modifications in a definite dashboard while keeping the source information intact. This way overwriting of the original dashboard is prevented.
  - ***Public* -** makes the dashboard available to other users as well if selected.
  - ***Scroll Mode*** - toggles the scrollbar thus allowing additional space for adding reports to the dashboard.
  - ***Remove* -** deletes a dashboard together with its contents.
  - ***Cancel* -** discards the modifications made to the dashboard currently displayed on the screen.

- **Update all -** loads the latest data from the database.

- **New -** creates a new dashboard.

- **Add New Item -** adds a new report under the definite dashboard from the list of all pre-defined reports previously created.

- **Dashboard Workspace -** the main screen of the *Dashboard* module where the content of a definite dashboard is viewed.

7.4 Dashboard Management

7.4.1 Create a New Dashboard

In order to create a new dashboard, follow the steps below:

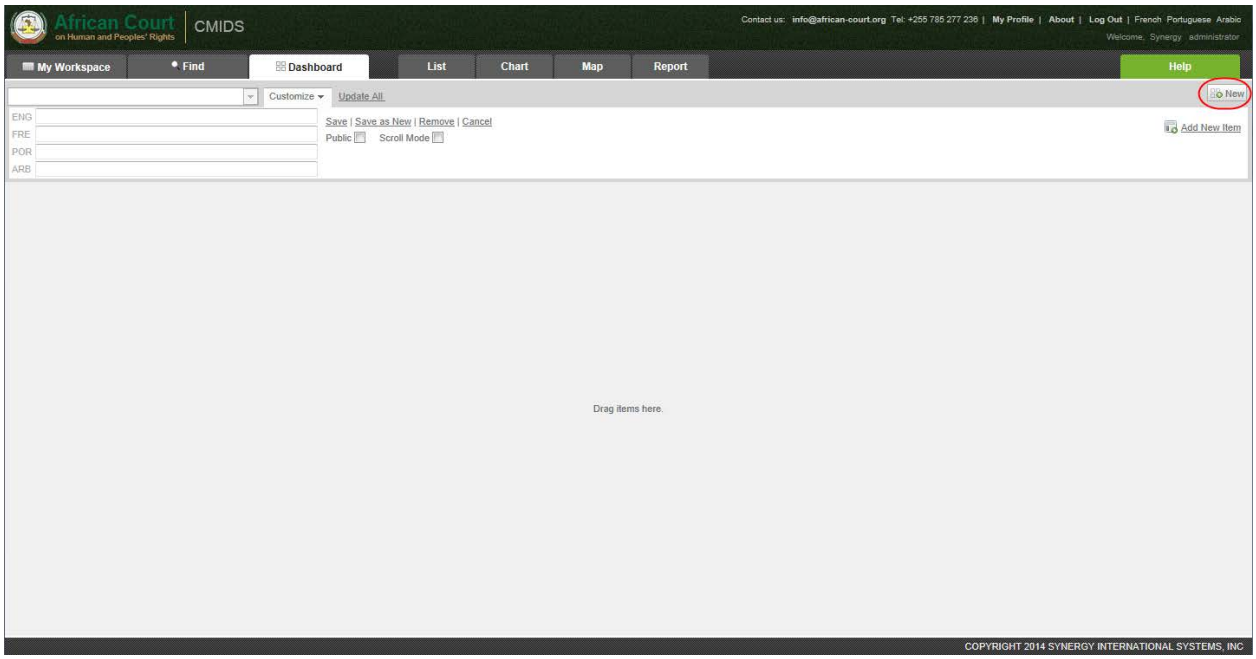


Figure 25: Adding a New Dashboard

1. Click the **New** button at the upper right corner of the screen. New field appears in the left part of the screen to give a name other than the default one to the dashboard and to save it. Also, the list of all existing pre-defined reports is used to add new items to the dashboard (Figure 25).
2. Give the desired name to the dashboard in the English, French, Portuguese, and Arabic languages.
3. Add reports to the dashboard, see Add an Item to a Dashboard.
4. Save the dashboard.

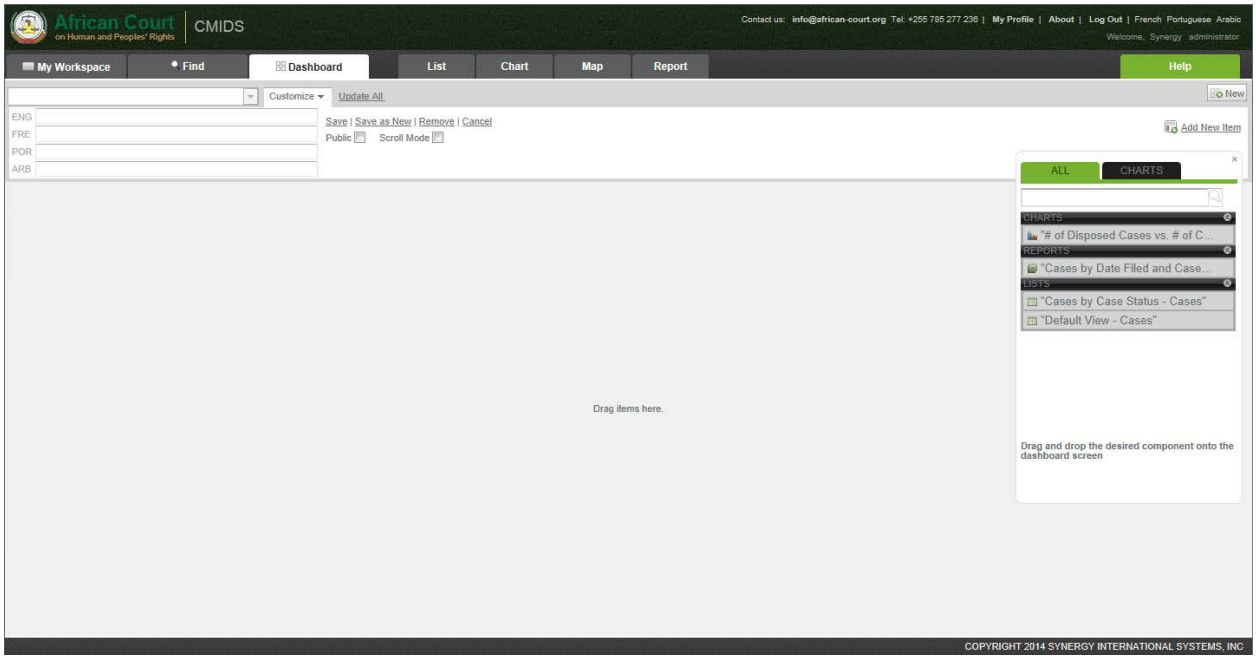


Figure 26: List of Pre-defined Reports

7.4.2 Add an Item to a Dashboard

In order to add a report to a dashboard, follow the steps described below:

1. Click the **Add New Item** link. The list of all reports previously saved reports will appear (Figure 26).
2. Select a report to add to a dashboard and drag-and-drop it onto the main screen.
3. If you want to add another report to the dashboard, select it in the list, drag it onto the main screen and hold the left mouse button until a green rectangle appears on the screen indicating an area where the new report can be placed. Keep the mouse button pressed until the green rectangle turns blue and release the mouse button (Figure 27).
4. You may add multiple reports to the dashboard.

Note: The reports can be arranged either in vertical or in horizontal order. Once the place for the report is selected, it cannot be changed.

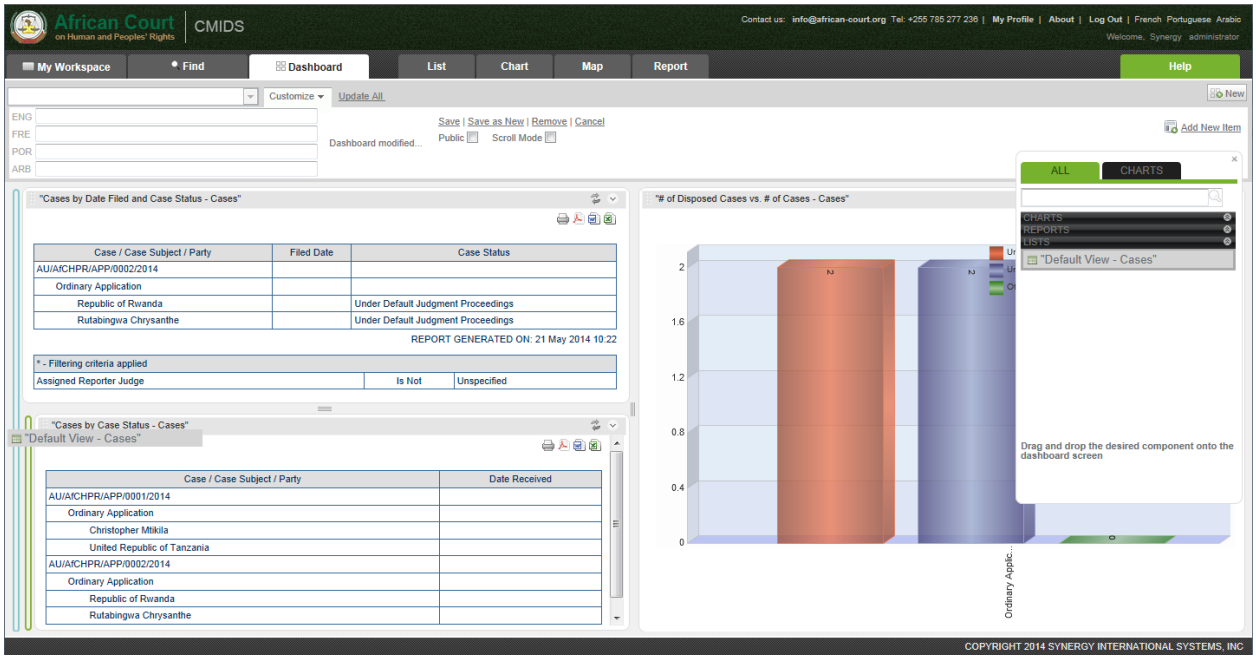


Figure 27: Adding a New Report

7.4.3 Customize a Dashboard

In the *Dashboard* module, you can customize any dashboard created, i.e. rename the dashboard, save the changes made to it, save a copy of the dashboard, delete a dashboard, and/or discard the changes made.

In order to customize a dashboard, follow the steps below:

1. Click the **Customize** button. A new section will appear displaying all customizable options in the *Dashboard* module (Figure 28).
2. Take the necessary action.
3. Save the changes.

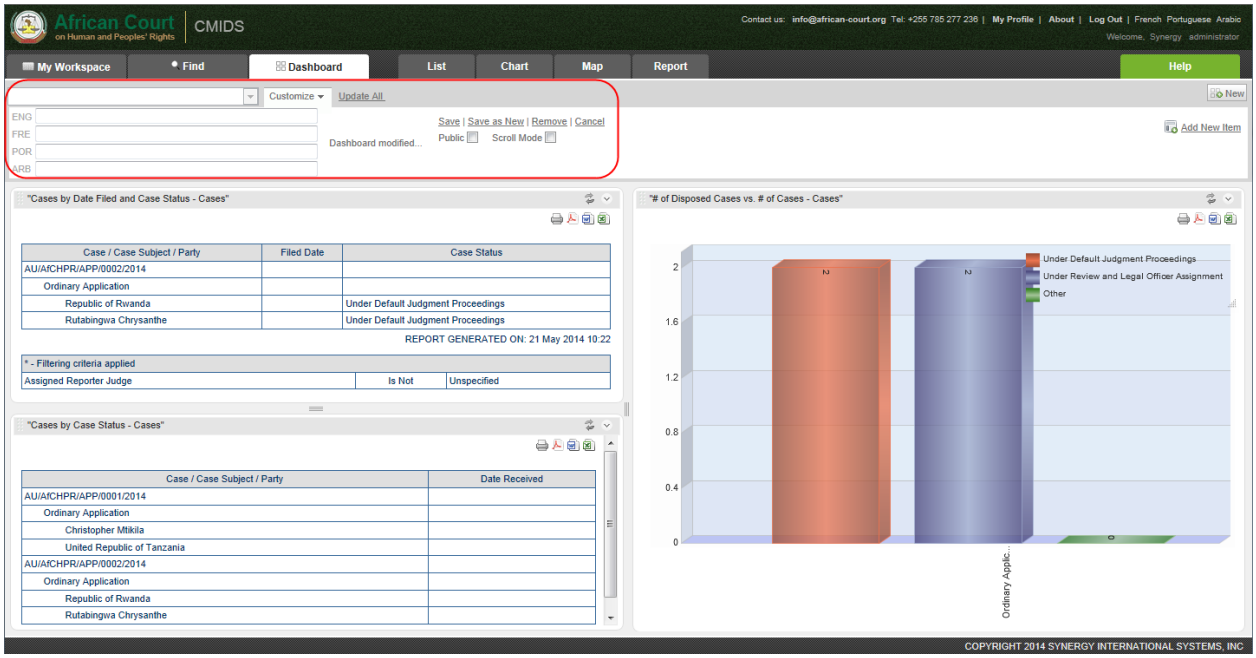


Figure 28: Customizing a Dashboard

7.4.4 Save a Dashboard

After the new dashboard has been created and items added to it, it is necessary to save it to be able to view it later on. It should be mentioned that there are two options for saving dashboards:

- **Save:** saves all modifications made to the dashboard.
- **Save as New**: saves a copy of a dashboard under a new name.

In order to save a dashboard / a copy of a dashboard, follow the steps below:

1. Select the respective **Save** or **Save as New** option.
2. Click **OK** in the message window indicating the dashboard / the changes to it have been saved successfully.

7.4.5 Delete a Dashboard

In order to delete a dashboard, follow the steps below:

1. Select the dashboard that you want to delete. Its contents will be displayed on the main screen.
2. Click the **Remove** link. The selected dashboard will be deleted.

7.4.6 Discard the Changes

In order to discard the changes made to the dashboard currently displayed on the screen, follow the steps below:

1. Click the **Cancel** link.
2. Confirm that you want to discard all changes made to the dashboard by clicking **OK** in the warning message window that appears.

7.4.7 Update Data

For decision makers, it is very important to have access to the latest data available. This is why the *Dashboard* module allows you to update all reports included in various dashboards. In order to load the latest data from the database, select the **Update All** option.

If you want to update the data in an individual report, click **Refresh** button in the top toolbar of the report screen. The latest data for the selected report will be loaded from the database.

8. LIST MODULE

In the *List* module (Figure 29) of the *CMIDS* application, you can create and execute ad-hoc queries on case data, and acquire results in form of a list.

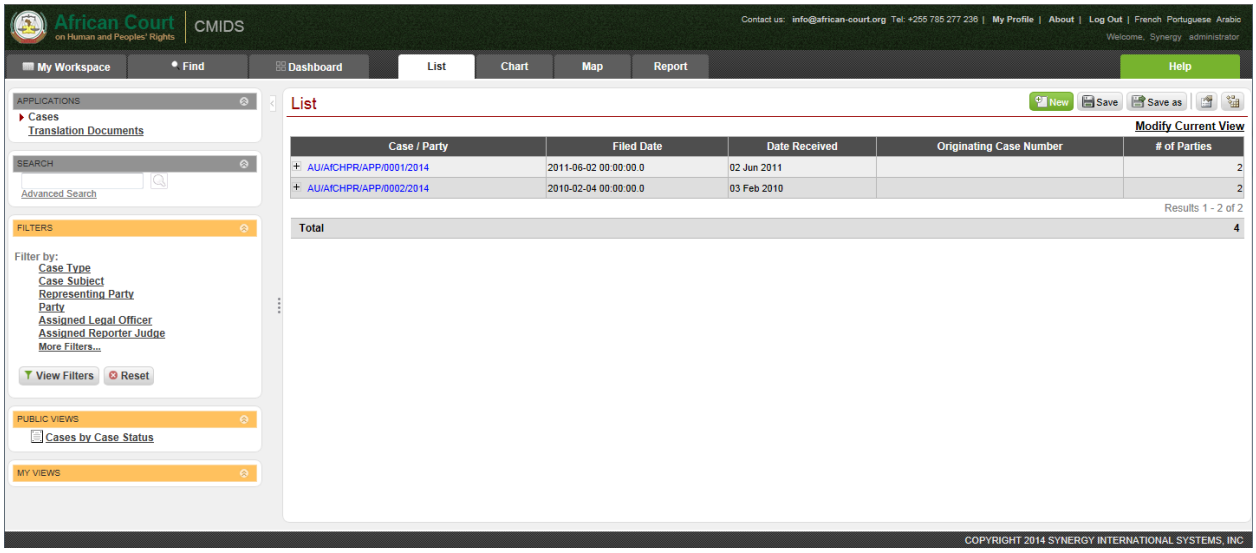


Figure 29: List Module

8.1 Accessing the List Module

A list consists of at least one group and one column, but the actual quantity of groups and columns is defined by the user's choice of view. Please see Modifying the Current View for more details on how to define groups / columns of a list.

In order to access the *List* module, click the **List** tab. You will be navigated to the *List* module. In this module, you can view data organised according to the selected groupings and columns, modify the currently used list, save it as a pre-defined report, include it under a definite group, etc.

8.2 Expanding the List Item

It is possible to expand the list item level to view the information of the sub-level(s). In order to expand the list item level, click the '+' sign next to the name of the list item. This will expand the list item group level displaying the first sub-level (Figure 30). This can further be expanded unless there are no more sub-levels to be displayed.

Note: You can expand only one group level at a time. If you expand the group level of another list item, the previously expanded group level will get collapsed.

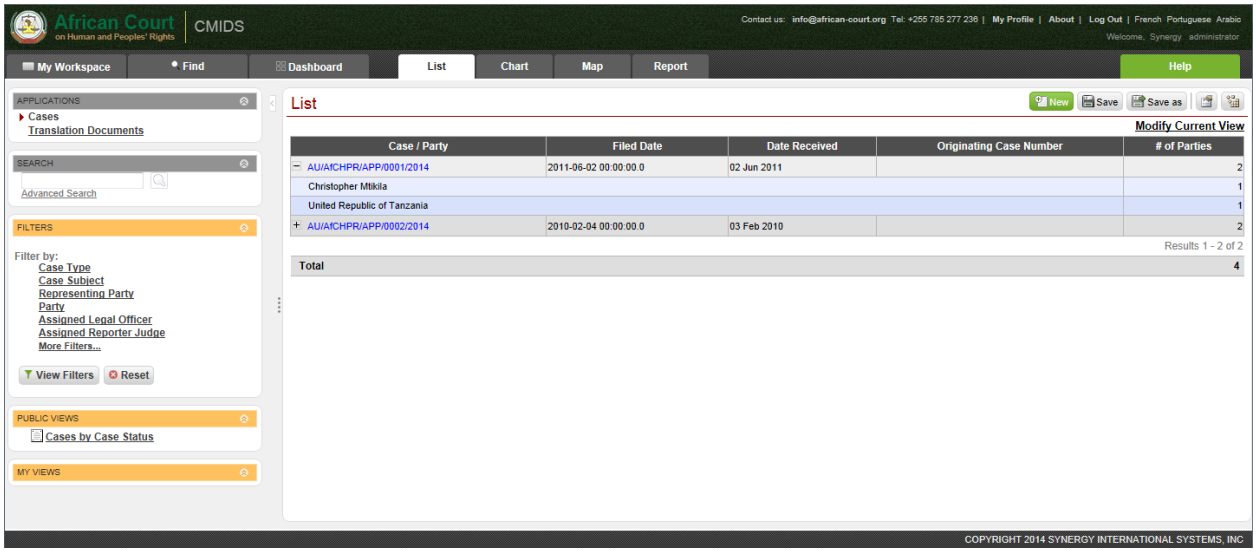


Figure 30: Expanding the List Item Level

8.3 Sorting List Items

You can sort the list view by column by clicking on the name of the column. This will sort the list alphabetically or numerically depending on the type of data entered into that column. The arrow that appears on the column can reverse the order of the list.

8.4 Browsing among List Items

You can browse among the list items by clicking on the number link of the page to navigate to. The **Previous** and **Next** buttons can be used to move to the required page.

8.5 Modifying the Current View

It is possible to modify the list that is currently displayed in the *List* module. You can add new groupings to it or remove the selected ones, (un-) select columns, re-order them, etc.

The steps described below provide for the necessary instructions for modifying the current view.

1. Click the **Modify Current View** link at the top right corner of the *List* screen. A *Modify Current View* window (Figure 31) will appear presenting the administrator with the groupings/columns selected and available for the list view.
2. In the *Groupings* section, add / re-order / remove groups.
3. In the *Columns* section, add / re-order / remove columns.
4. In the *Cross Tab Groupings* section, define add / re-order / remove column groupings for the view.
5. Set the view as default, if necessary. Please note that the view can appear as default for a current user or for unregistered public users.
6. After finishing making changes in the view, click the **OK** button for the changes to take effect. Or, click the **Cancel** button to discard the changes made.

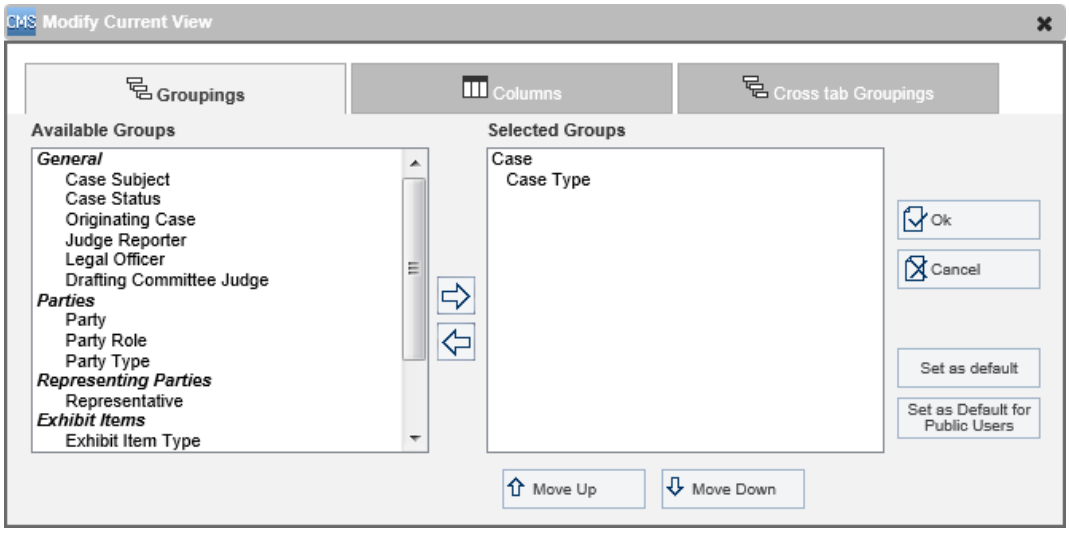


Figure 31: Modifying the Current View

8.5.1 Adding List Groups / Columns / Column Groupings

In order to add a group / column / column grouping to the list, follow the steps below:

1. In the *Available Groups / Columns* panel, select the group / column / column grouping to be added to the list.
   Note: It is possible to select several groups / columns by means of the **Shift** or **Ctrl** keyboard buttons.
2. Click the **(Select)** button. The selected group(s) / column(s) will appear in the *Selected Groups / Columns* panel.

8.5.2 Re-ordering Groups / Columns / Column Groupings

In order to re-order the selected groups / columns / column groupings, follow the steps below:

1. Select the group / column / column grouping that needs to be re-ordered in the *Selected Groups / Columns* panel.
2. Click the **Move Up / Move Down** button.

8.5.3 Removing Groups / Columns / Column Groupings

In order to remove the selected groups / columns / column groupings from the list, follow the steps below:

1. In the *Selected Groups / Columns* panel, select the group / column / column grouping that needs to be removed from the list.
2. Click the **(Unselect)** button. The selected group(s) / column(s) / column grouping(s) will be removed from the *Selected Groups / Columns* panel.

8.5.4 Setting a View as Default

After making changes in the view currently displayed in the *List* module, you can set the newly-created view as default. This means that the new view will appear when you will next time access the *List* module.

In order to set a view as default, follow the steps below:

1. Make the necessary changes in the current view as described in the sections above.
2. After finishing, click the **Set as default** button in the *Modify Current View* window. Please note that the view will be set as default only for the current user.

Note: The **Set as Default for Public Users** button is only available for administrators and will save the current view as a default for all unregistered/public users.

9. CHART MODULE

The *CMIDS* application is equipped with a powerful chart designer that empowers you with all necessary tools to create charts for professionally looking presentations and reports. A user-friendly interface, great number of visual effects and pre-defined chart types, flexible chart components selection, and on-screen real-time chart visualization make using the chart designer an easy and delightful experience.

9.1 Key Features

You can make use of the following key features of the *Chart* tool in *CMIDS*:

- ✓ Rich user interface that supports movable windows for arranging the screen as desired.
- ✓ The ability to resize the charts directly in the workspace.
- ✓ The ability to show or hide the data labels and legends.
- ✓ The ability to customize the coloring, or choose pattern-filled charts for black and white printing.

9.2 Accessing the Chart Module

As it has been stated above, the system provides for the opportunity to present data in the form of different charts. In order to access the *Chart* module of the system, click the **Chart** tab. The *Chart* module appears where a pre-defined chart is displayed.

9.3 Main Screen and Its Components

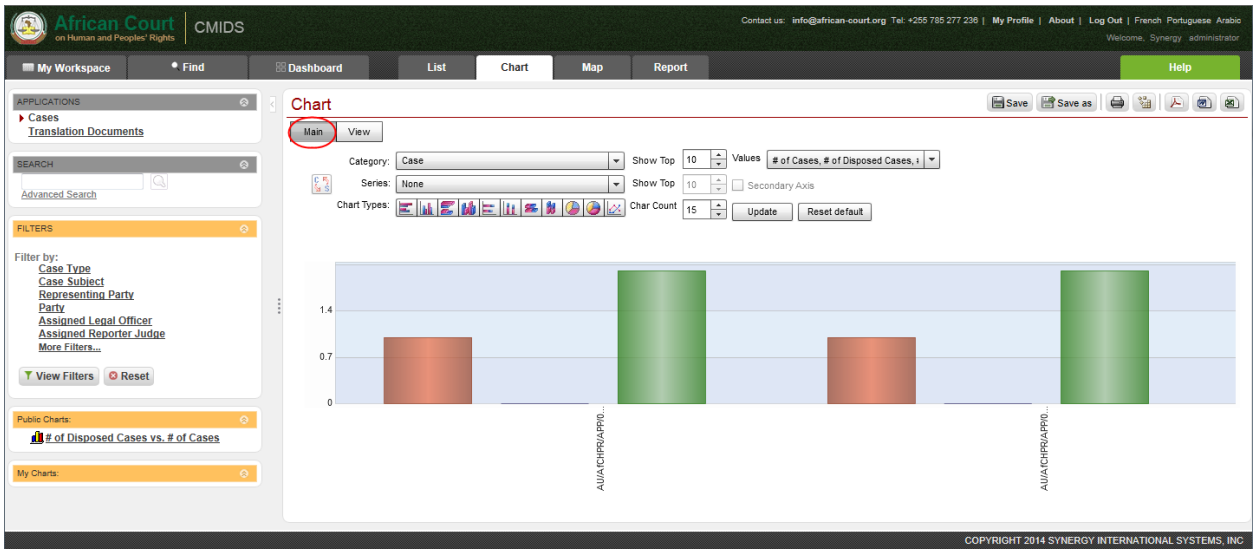


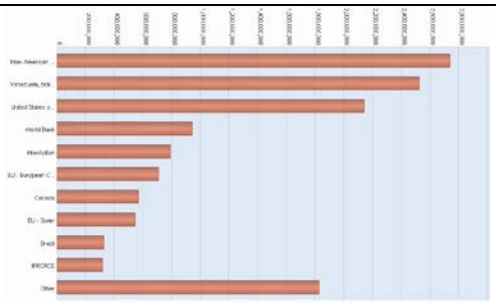
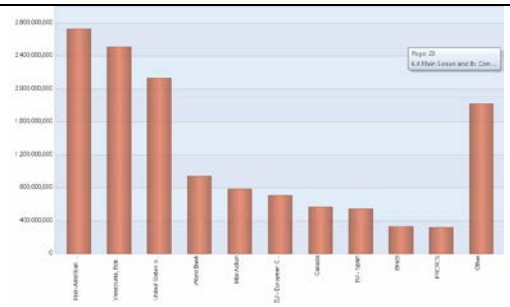
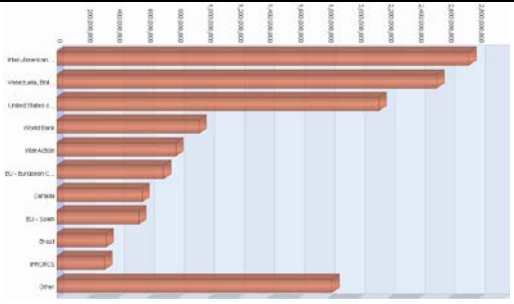
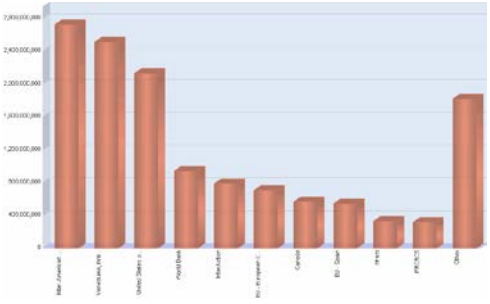
Figure 32: Main Screen of the Chart Module

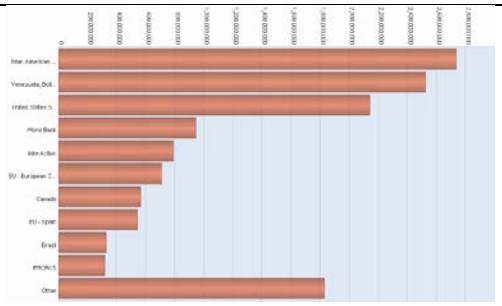
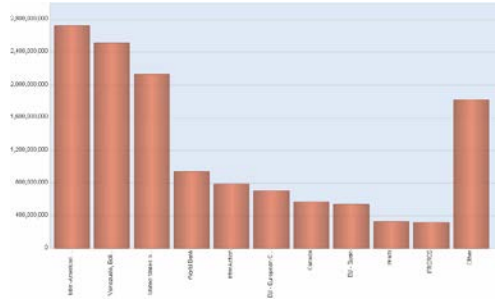
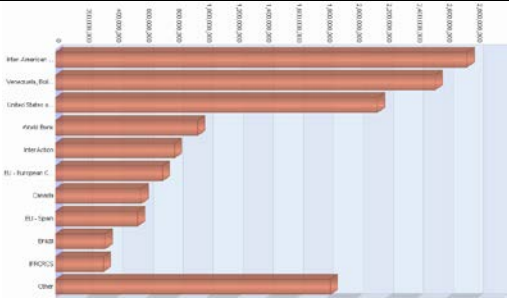
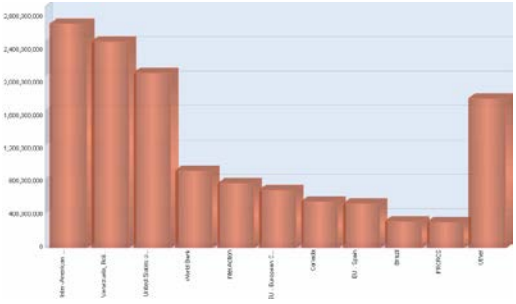
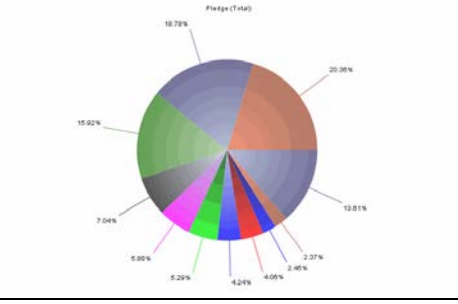
1. **Category** - allows selecting one of the options provided in the **Category** drop-down menu located at the top of the *Chart* window. The selected category will define one of the chart axes. Selection of a category for the chart report is required.

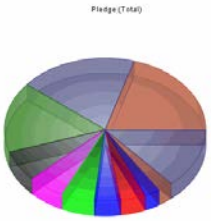
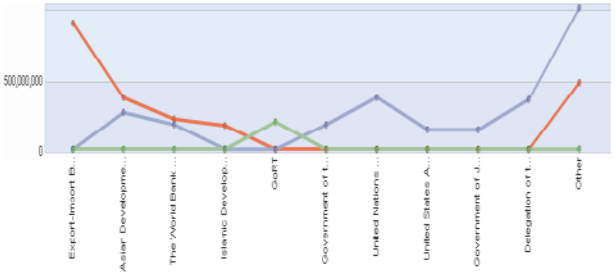
2. **Series** - allows selecting one of the options provided in the **Series** drop-down menu located at the top of the *Chart* window. The selected series will define the chart legend. Selection of a series for the chart report is optional.

   Note: Clicking the **(Swap)** button allows switching places of category and series selections.

3. **Chart Types** - allows defining the chart type. The following options are available:

Chart Type	Example
1. Bar chart	
2. Column chart	
3. 3D Bar chart	
4. 3D Column chart	

5. Stacked Bar chart	
6. Stacked Column chart	
7. Stacked 3D Bar chart	
8. Stacked 3D Column chart	
9. Pie chart	

10. 3D Pie chart	
11. Line chart	

4. **Show Top <Number>** - indicates the maximal number of category items to be displayed in the chart.

5. **Show Top <Number> on Secondary Axis** - indicates the maximal number of series items that should be displayed on the secondary axis in the chart. Becomes available only if a *Series* is selected. This option is disabled if you have selected the pie or line chart types.

6. **Char Count** - limits the number of characters to be used to display the category item names to the value set in this field.

7. **Values** - allows selecting a value from the list that will define the main chart criteria.

8. **Update** - loads the latest data from the database and displays them on the chart.

9. **Reset Default** – loads the default chart built according to the default chart category and chart type.

10. **Workspace** - the main working area in the *Chart* module where the chart designed is displayed.

9.4 View Screen and Its Components

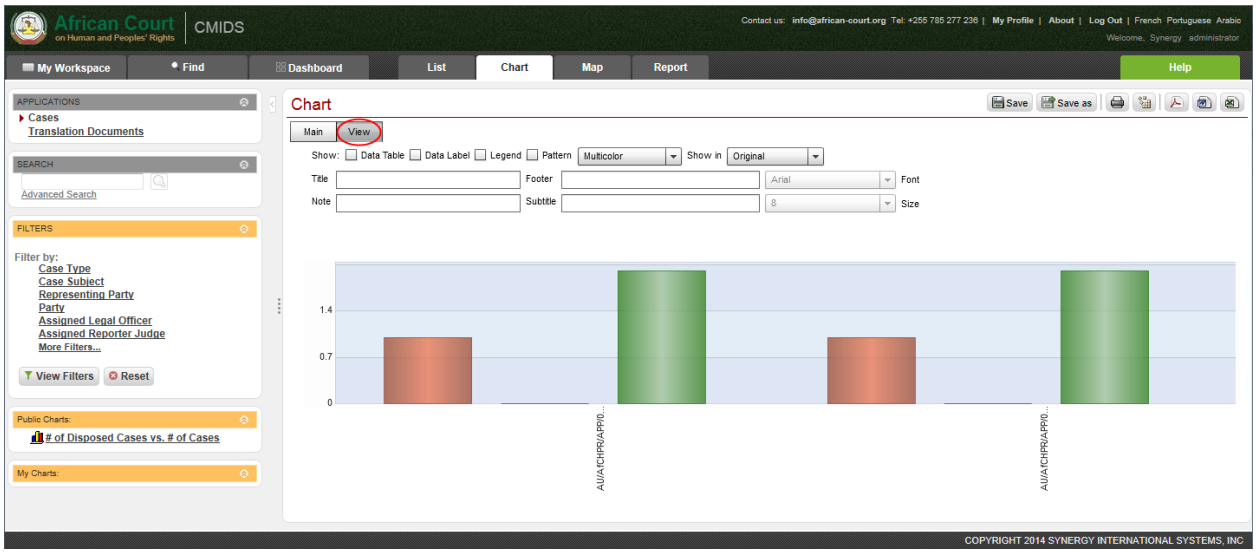


Figure 33: View Screen of the Chart Module

1. **Show -** allows selecting one or several of the following options:
   - ***Data Table* -** presents the information contained in the chart in a grid or matrix.
   - ***Data Label* -** shows the actual values of each chart cell.
   - ***Legend* -** explains the categories and data series displayed on the chart.
   - ***Pattern* -** allows choosing a pattern-filled chart for black and white printing.
   - ***Coloring Option* -** allows defining whether the chart should be displayed in multiple colors or in one of the colors available.
   - ***Show in* –** allows defining how the numeric values will be displayed on the chart. To avoid large number occupying too much space, you can choose to view the numbers in thousands / millions / billions.

2. **Title** – a text box to enter the chart report title.

3. **Note -** a text box to enter additional information about the chart report.

4. **Footer -** a text box to insert a portion of text that will appear in the bottom area of the chart report.

5. **Subtitle -** a text box to enter a subtitle for the chart report.

6. **Font -** allows selecting the font the chart report title/subtitle/footer/note will appear in.

7. **Size -** allows selecting the font size the chart report title/subtitle/footer/note will appear in.

8. **Workspace -** the main working area in the *Chart* module where the chart designed is displayed.

10. MAP MODULE

In the *Map* module of *CMIDS*, you can make use of an advanced GIS tool for data visualization, mapping and analysis.

In this module, you can plot data directly on a map and then access that data through the map. You can also query, aggregate, disaggregate, filter, and edit data on a map, visually capture data at any desired level, from the most general to the most detailed, down to the district level.

Moreover, the GIS tool offers an impressive array of state-of-the-art, advanced GIS features, such as the ability to zoom freely; to select a point on a map and ask the system to display any category of data within a given radius ('buffered zone querying').

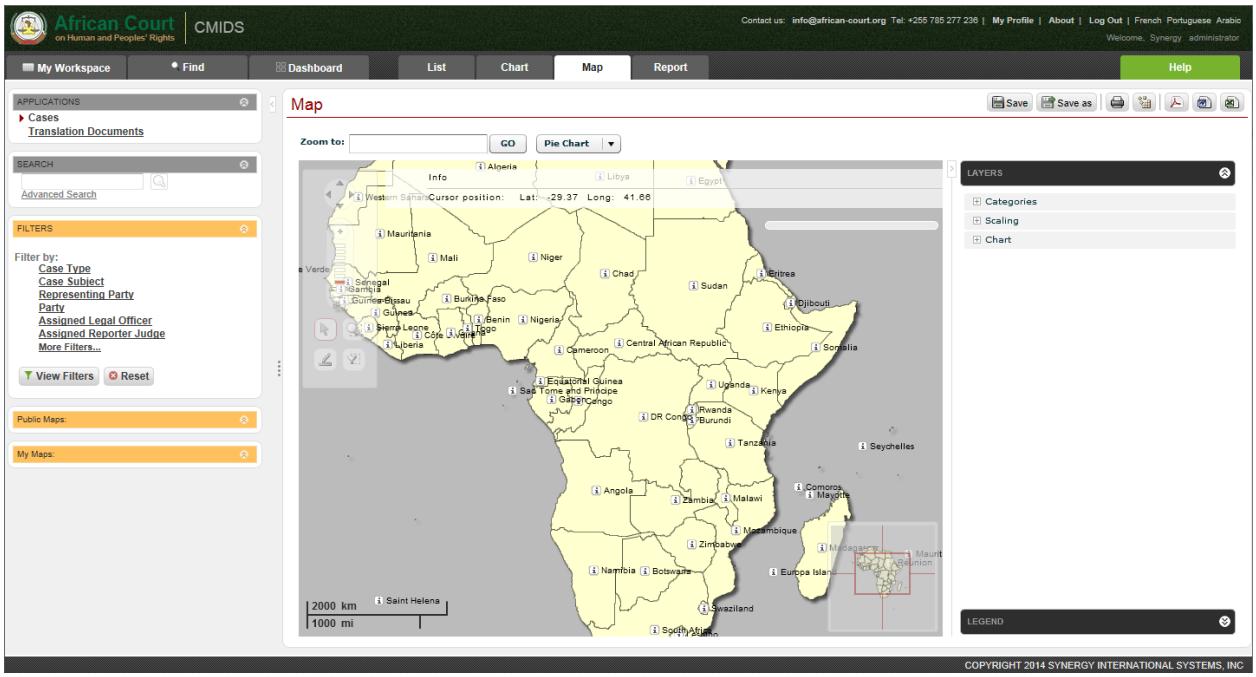


Figure 34: Map Module

10.1 Key Features of the GIS Tool

Below are the key features of the GIS tool in the *CMIDS* application:

- Vector-based platform

- Multi-layer mapping
  - Dynamic number of administrative territorial units
  - Category or Indicator data
  - Static Data (Borders, Cities, Rivers, Roads, Construction Sites, etc.)
  - Names and Labels
  - Any other type of layer

- Data visualization features
  - Plotting Category or Indicator Data as icons/images/flags

  - Plotting data based on GPS coordinates
    Any layer which contains data associated to a precise GPS coordinate can be plotted on the map.
  - Coloring administrative territories based on dynamic scaling (e.g. level of certain pollution)
  - Plotting graphs on maps
  - Attaching photo images to GPS locations (or conditional locations)

- Reference features
  - Legend
  - Dynamic legends are displayed depending on the selection of layer(s).
  - Tooltips
  - Details of an administrative territories
  - Details on plotted categories and indicators

- Navigation features
  - Free zoom-in/zoom-out
  - Mouse wheel-based zoom-in/zoom-out
  - Scaled zoom-in/zoom-out
  - Map Panning (mouse drag and buttons)
  - Mini Map Preview
    The preview displays a small window of the entire world or country and is used for quick navigation to a desired location with one click without having to zoom out, find the new location and zoom in again.

- GIS specific features
  - Distance Measurement
  - Buffered Zone Querying
  - Geocoding

- Internationalization features
  - User interface multi-lingual capability
  - Map multi-lingual capability

- Export & Print
  - Export to PDF, Word, or Excel
  - Print

- Interoperability
  - Map retrieval via web services

10.2 Accessing the Map Module

The system provides for the opportunity to present data on the map. In order to access the *Map* module of the system, click the **Map** tab. You will be navigated to the *Map* module where the map of the African continent is displayed.

In the *Map* module, you can choose to view different data sets displayed on the map, create and display reports, save them as pre-defined reports, arrange them in the desired way, print them, etc.

10.3 Map Module Screen Components

The following figure describes some of the features available in the main screen of the *Map* module (Figure 34):

1. **Zoom to panel -** allows free zooming to the desired administrative territory.
2. **Chart type selector -** allows defining whether the data should be presented in form of a pie chart or a bar chart when plotting graphs on the map.
3. **Navigation controls -** a set of tools that provide common navigation functions, such as panning and zooming.
4. **Map -** the map of the African continent.
5. **Scale Bar -** allows you to work out the distances on the map. The distances are expressed both in the metric and English units of measure.
6. **Mini Map -** an overview map of the entire continent displayed in a small window allowing quick navigation to a desired location with one click without having to zoom out, find the new location and zoom in again.
7. **Layers Panel -** provides a variety of data to choose to display on the map.
8. **Legend Panel -** explains the categories and data series displayed on the map.
9. **Location information section -** displays the name of the administrative territory when it is pointed on the map.
10. **Cursor position section -** displays the geographic coordinates (expressed as latitude and longitude) for any point on the map.

10.4 Working in the Map Module

10.4.1 Zooming in / Zooming out

The GIS tool is equipped with the advanced zooming capabilities used to enlarge or reduce the view of the map on the screen. The following zooming options are available:

Free zoom in / zoom out

This option allows you to easily explore the data through Intelligent Searching. You can enter any combination of letters in the *Zoom to* panel and select the administrative territory

to navigate to from the list containing the search results (Figure 35). The selected item will be magnified and displayed in the main screen.

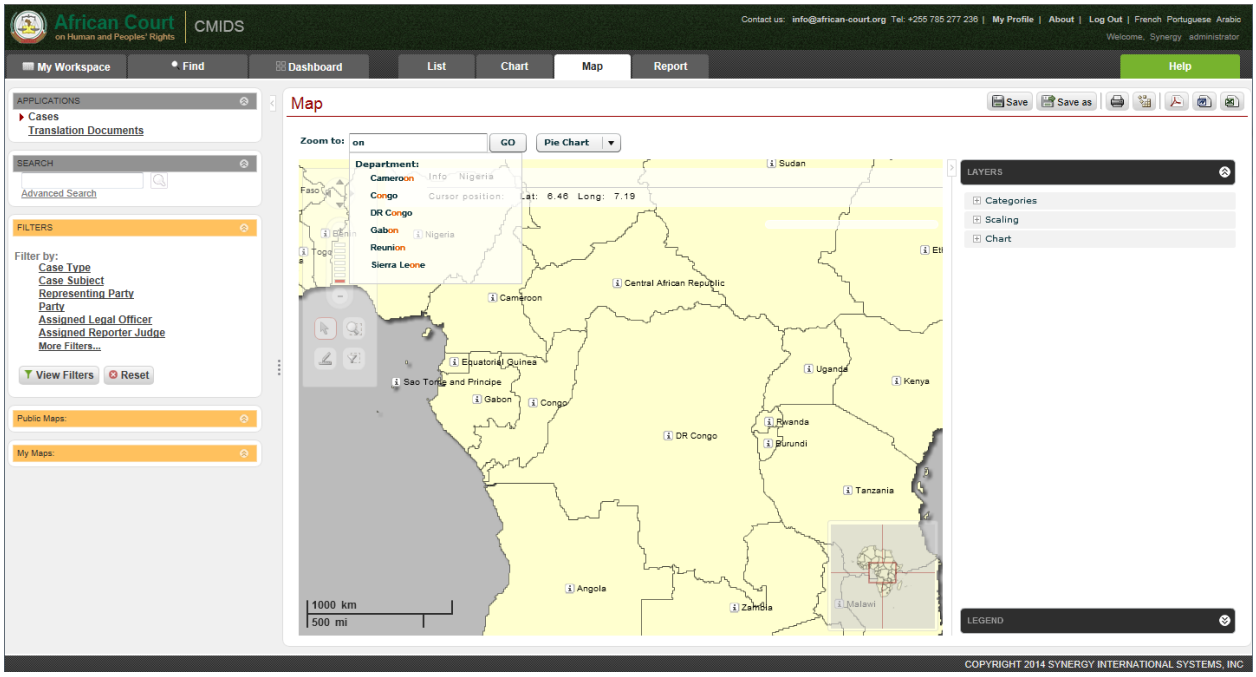


Figure 35: Intelligent Searching

Scaled zoom in / zoom out

This option allows zooming in / zooming out using the scale tool available in the Advanced GIS.

This means that when changing the zoom scales by clicking either on or , you can magnify or reduce the viewport according to the scale value.

Mouse wheel-based zoom-in/zoom-out

This option supports mouse wheel-based zooming in / zooming out. In order to enlarge or reduce the viewport using the scroll wheel button of the mouse, you should click anywhere on the map and use the wheel button in the backward motion to zoom in and in the forward motion to zoom out.

Zoom by Selection

This option allows magnifying the original viewport or a portion of it using the mouse. To be able to enlarge an area on the map, you should activate the *Zoom by Selection* option by clicking the button then select a region on the map to magnify.

10.4.2 Measuring Distance

In the *Map* module, you can measure the distance between two points on the map.

To do this, click button, select the point on the map and drag the mouse to the second point to trace a path to measure (Figure 36). The measured distance will be expressed both in metric and English units of measure.

Note: Measuring is calculated using the latitude and longitude coordinates from point to point and does not consider elevation.

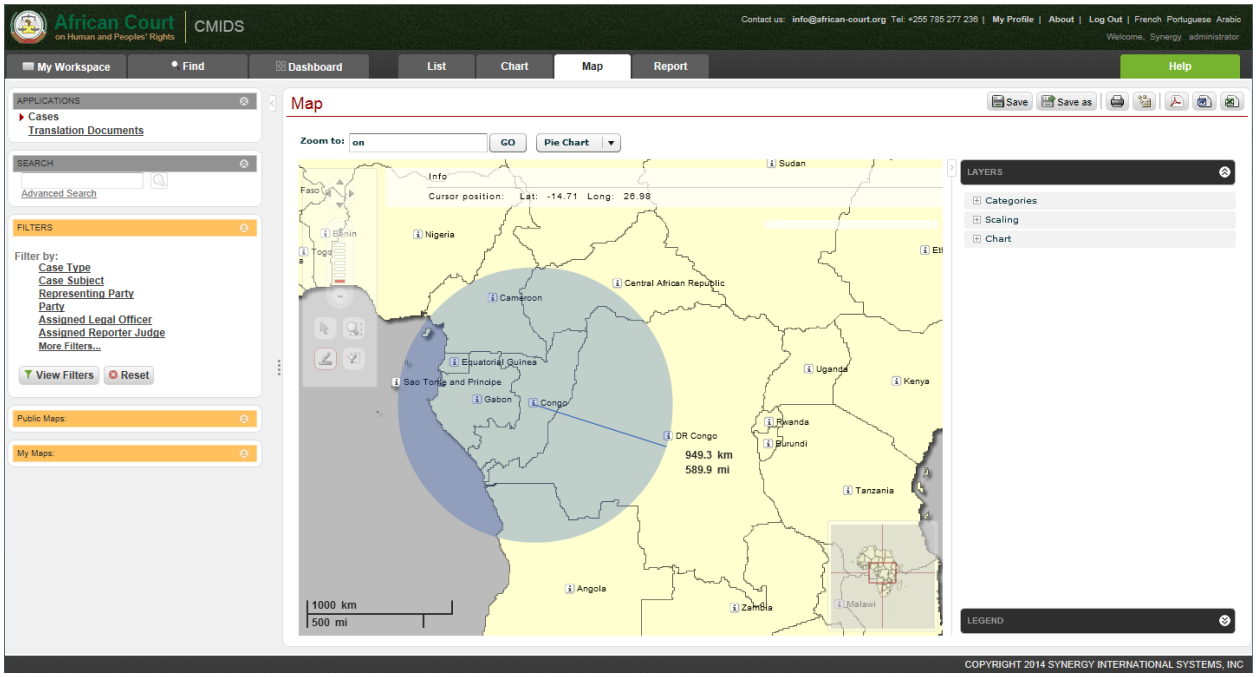


Figure 36: Measuring Distance

10.4.3 Buffered Zone Querying

This feature in the Advanced GIS tool is used to select a point on a map and display any type of data within a given radius. In addition, the tool is easily navigable through a Mini Map, Navigation Bar and Intelligent Search Tools.

To be able to create a buffered zone to view data for, select the button, and then select the region on the map to highlight. The selected area will be activated while the rest of the screen will be disabled (Figure 37). This tool may be useful for presentations on screenshots to mark the selected area on the map.

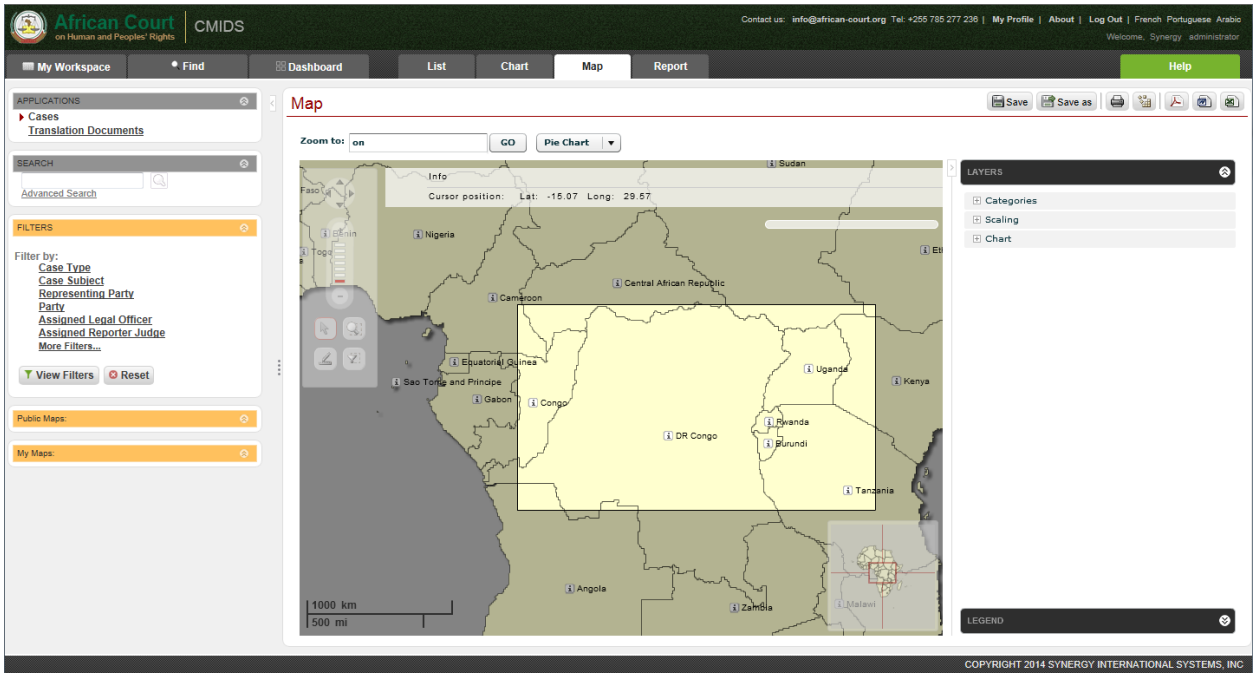


Figure 37: Buffered Zone Querying

10.4.4 Using Layers

The *Layers* feature in the *Map* module provides a variety of data to select to display over the viewing area. You can use the *Layers* feature to display the following information:

- Display categories;
- Choose to view data on a scaling map;
- Plot data in the form of different graphs (pie chart or bar chart);

The following layers can be applied in *CMIDS*:

Categories

This option is used to plot category data on the map and to view them in form of different icons / images. To enable this option, expand the *Category* section and selecting the category(ies) listed.

Note: When pointing the mouse cursor on a respective icon/image on the map, you can view the details for the selected category.

Scaling

This option is used to view the data on a scaling map. This means that the selected data series will not be displayed in form of graphs, but the administrative territories will be colored according to the selected scaling category instead. The scaling legend at the bottom left side of the map prompts on the coloring pattern used.

To enable this option, expand the *Scaling* section in the *Layers* panel and select one of the possible alternatives listed.

Chart

You can plot different data series on a map and view them in the form of different graphs, such as pie charts or bar charts. You can turn on this option by expanding the *Chart* section in the *Layers* panel and selecting the chart category(-ies) to be displayed on the map. By default, the selected category(-ies) will appear in the form of a pie chart. However, you can choose the view the data in the form of a bar chart by selecting the appropriate option from the *Chart Type* drop-down (Figure 38).

Note: When pointing the mouse cursor on any of the chart constituents, you can view the data that stands behind it. The details on plotted chart categories are displayed when clicking the ℹ button.

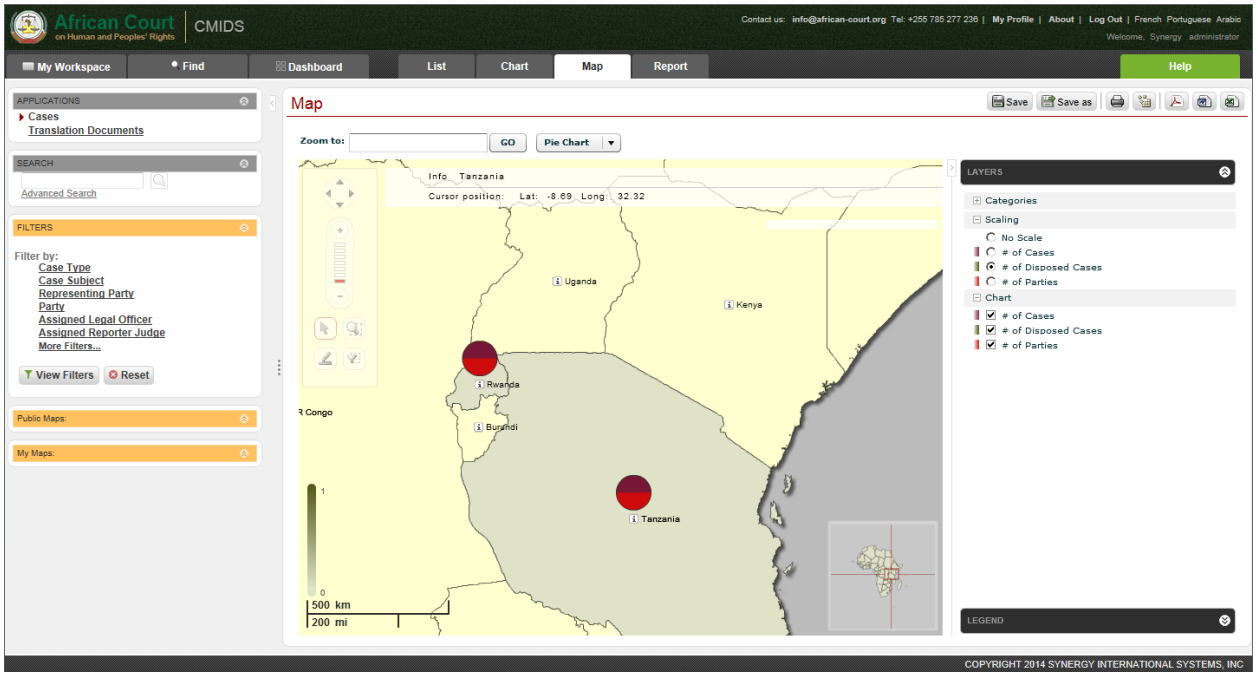


Figure 38: Selecting Chart Type

10.4.5 Viewing Legend

To explain the data series or categories on the map, the legend is used to identify the patterns or colors that are assigned to the selected categories (Figure 39). It is worth mentioning that each data series or category is represented by a unique pattern or color in the map legend, which is displayed in the following ways:

- In the *Legend* section if you have chosen to apply any category to the map.
- At the bottom left side of the map if you have selected to view data on the scaling map.

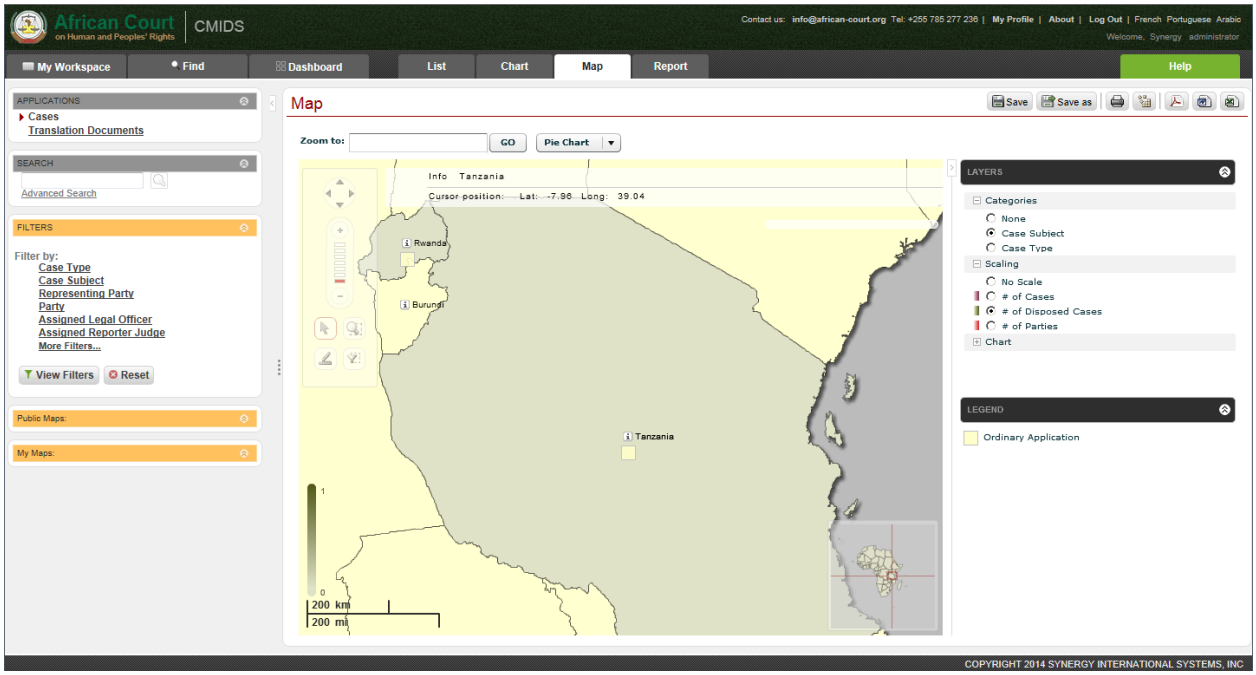


Figure 39: Viewing Chart Legend

10.4.6 Using Mini Map

The Mini Map window feature displays an additional view of the country map with a position indicator that corresponds to the current view inside the main screen (Figure 40). One of the main features of the Mini Map is that while the Mini Map window responds to position adjustments in the main screen, you can also interact directly with it. Double-clicking any area within the window or dragging the position cursor to the desired place will adjust position both in the Mini Map and in the main screen to the point in the Mini Map window that the user selects.

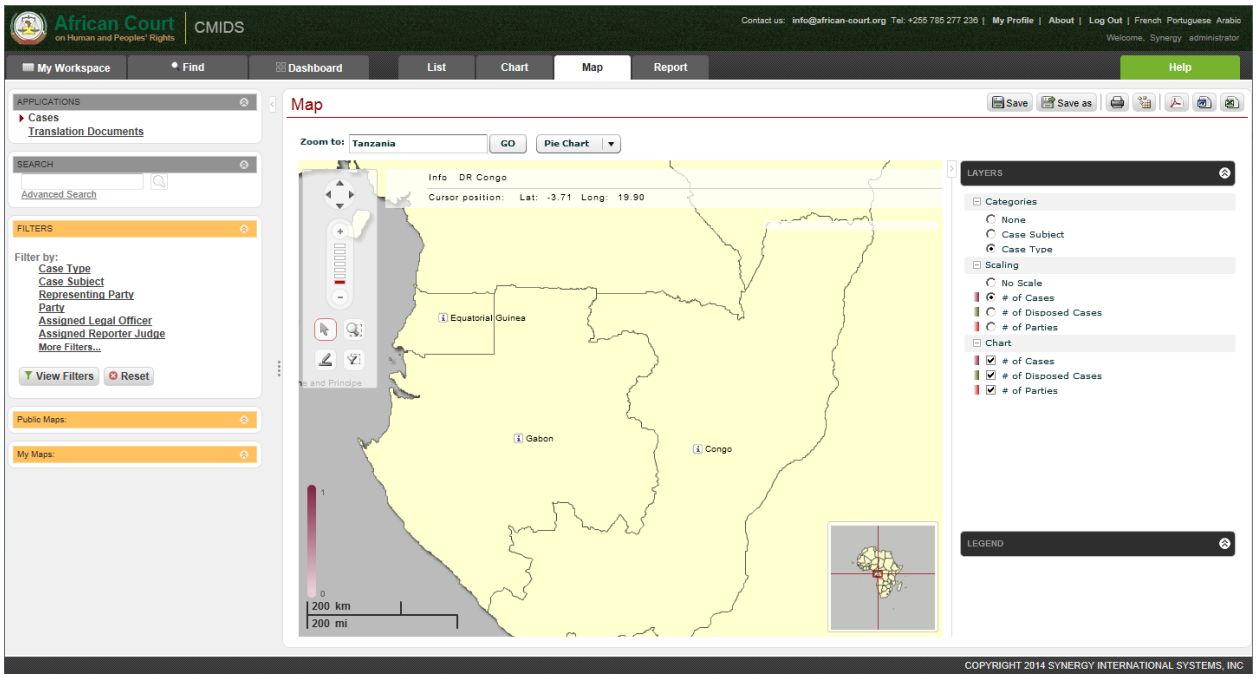


Figure 40: Using Mini Map

10.4.7 Viewing Data Displayed on the Map

The Advanced GIS tool is used to view the data referring to definite territorial units. In order to access the data for a specific territorial unit, point the mouse cursor on the ℹ button (Figure 41). The information that is displayed in the information window includes # of cases implemented in the given administrative territory, # of disposed cases, and # of parties. If you have plotted any chart category on the map, the chart category details appear in the information window as well.

Note: Clicking the **View Cases** link at the bottom of the information window will take you to the *Details* section of the application. For more information about the actions that can be taken in this section, see DETAILS SECTION.

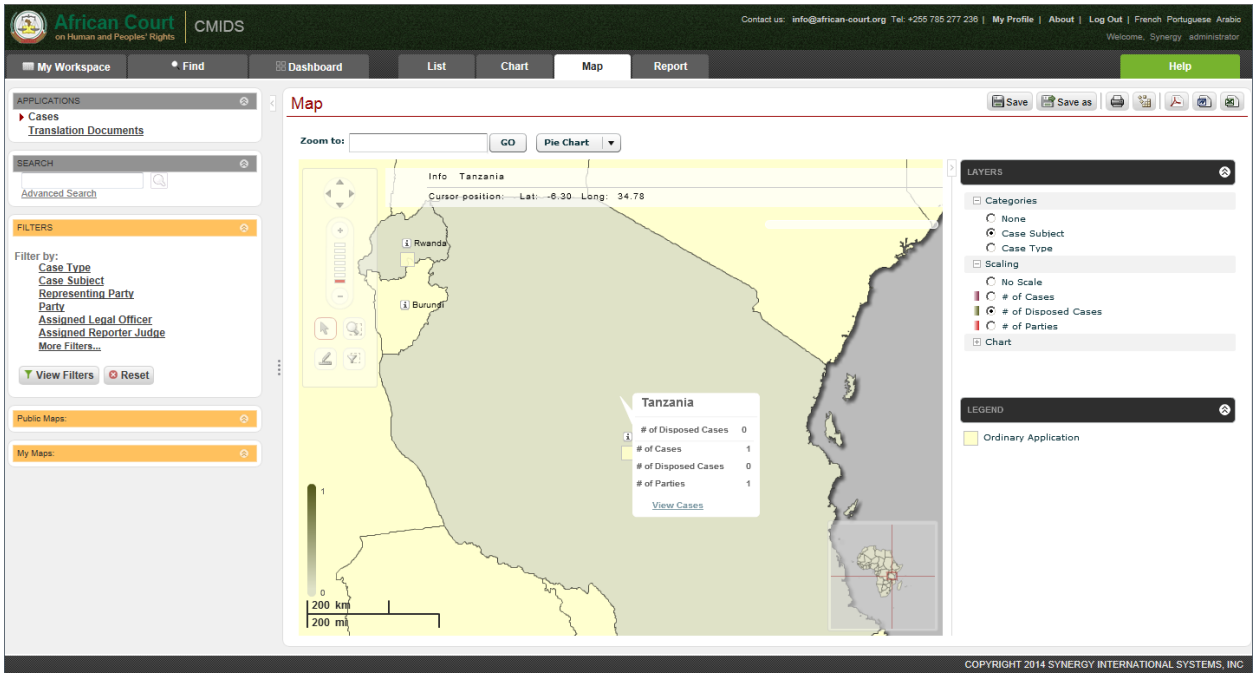


Figure 41: Viewing the Data Displayed on the Map

11. REPORT MODULE

In the *Report* module of *CMIDS*, you can create and execute ad-hoc queries on the data, and acquire results in the form of different reports.

11.1 Accessing the Report Module

As it has been stated above, the system provides for the opportunity to create different sorts of list reports. In order to access the *Report* module of the system, click the **Report** tab. You will be navigated to the *Report* module of the application where the *Report Designer* (Figure 42) will open.

In this module, you can create list reports, save them as pre-defined reports, arrange them in the desired way, print them, etc.

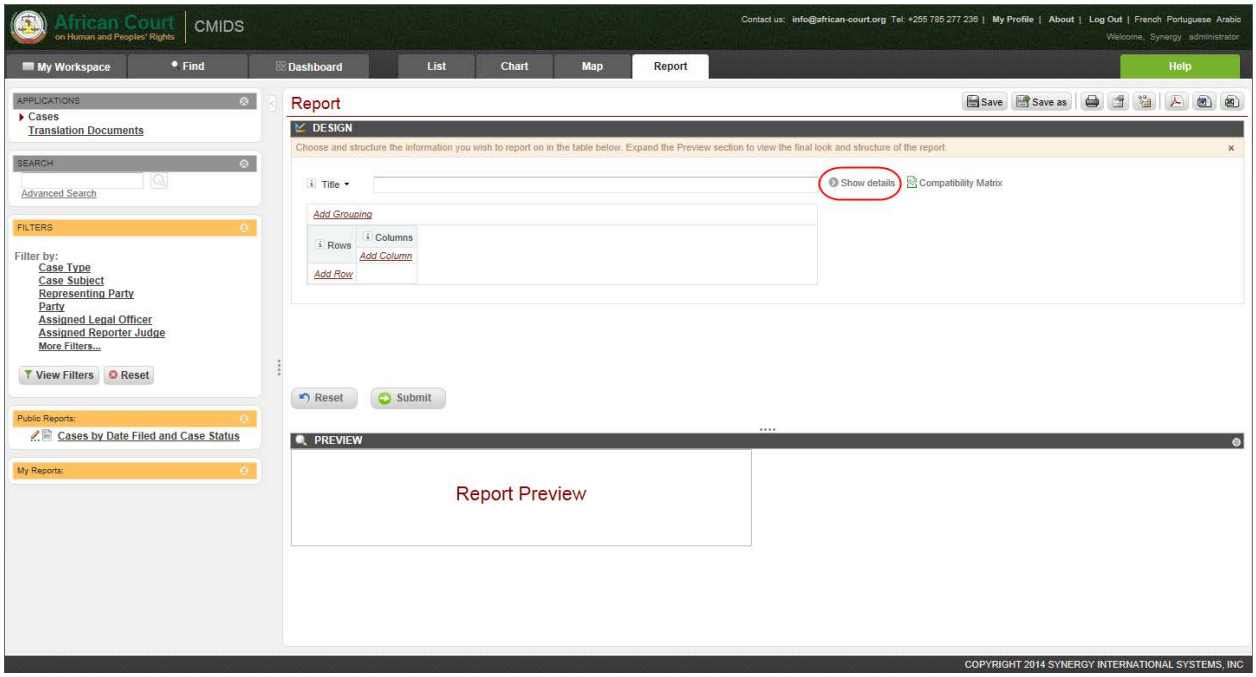


Figure 42: Report Module

11.2 Creating a Report

In order to create a report, i.e. to structure the report table and choose what information should appear in the rows and columns of the table, add report components, which are:

- **Text entries** – title, subtitle, header, and footer. For these fields, the expected input is a free text.

  Note: By default, the *Report Designer* gives you the possibility of adding report titles. However, you can change the default view to make adjustments for other text entry components (sub-title, header, and footer) as well. To be able to provide additional textual information to the report, you will have to click the **Show Details** link (Figure 42) and provide the appropriate information in the fields that emerge. Clicking the **Hide Details** link will collapse the text entry fields displaying only the **Title**.

- **Report grouping** - allows grouping data according to a specific category. Grouped data appear in different tables. Each table contains data that fall under one group of the category specified.
- **Rows** - group data within the report table.
- **Columns** - show details specific to each table row.
- **Sub-columns** - divide the row details displayed under each column.

In order to add report components, follow the steps below: They provide instructions on how to compose and submit queries.

1. Type the text that should appear as the report title in the **Title** text box.
2. Enter a **Subtitle**, **Header**, and **Footer** if needed.
3. In the *Group Report by* section, specify the category, which will be used to group data into different tables. To add a report grouping, click the **Add Grouping** link in the *Group Report by* section and select the appropriate category from the menu that appears (Figure 43).
   Note: The report will be divided into as many tables as there are table groupings selected.

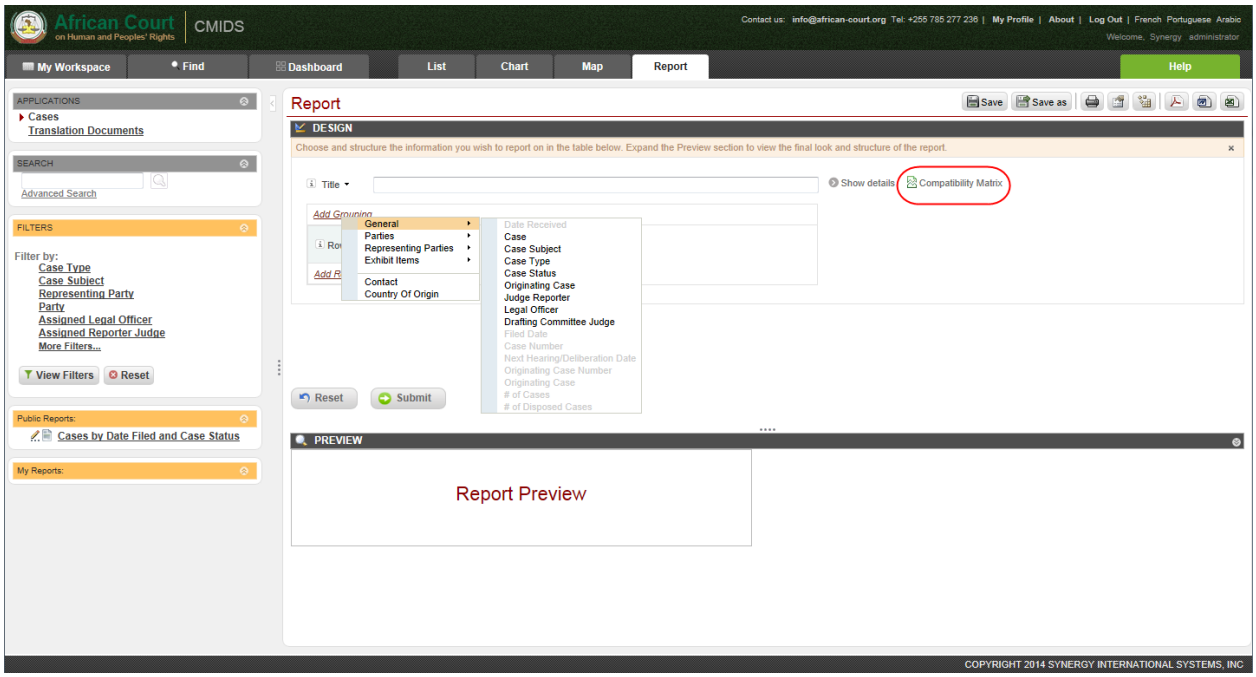


Figure 43: Selecting a Grouping for a Report

4. Select table rows by clicking the **Add Row** link and selecting the appropriate item from the menu that appears. Please note that it is possible to select one row at a time from the list of available rows.
5. Select table columns by clicking the **Add Column** link and selecting the appropriate item from the menu that appears. Please note that it is possible to select one column at a time from the list of available columns.
   Note: Once you have selected a report column, an **Add Sub-column** link becomes available under the selected column. It allows indicating how the row details displayed under each column will be divided.

Note: At any point it is possible to remove all components selected for the report and design a new report from scratch by clicking the Reset **(Reset)** button.

Note: If you have defined a report which has incompatible columns (columns over which reports cannot be generated), they will be marked in red and an error message will occur. To make your reports productive, use the link (as marked in red, Figure 43) to open the *Compatibility Matrix* table (Figure 44). This is a table that displays the compatibility between all categories and measures in the database to display them in the report.

Compatibility Matrix

• - indicates compatibility between Category and Measure

Rows(Categories) / Columns(Measures)	# of Cases	# of Disposed Cases	# of Parties	Actual Physical Address	Age	Business Phone	Case Number	Country of Origin	Date of Birth	Date Received	Email	Filed Date	Home Phone	ID	Member State	Mobile Phone
Case	•	•	•				•			•		•				
Case Status	•	•	•													
Case Subject	•	•	•													
Case Type	•	•	•													
Contact	•	•	•													
Country Of Origin	•	•	•													
Disposition Method	•	•	•													
Drafting Committee Judge	•	•	•													
Exhibit Item	•	•	•													
Exhibit Item Type	•	•	•													
Gender	•	•	•													
Judge Reporter	•	•	•													
Legal Officer	•	•	•													
Member State	•	•	•													
Originating Case	•	•	•													
Party	•	•	•	•	•	•		•	•		•		•	•	•	•
Party Nationality	•	•	•													
Party Role	•	•	•													
Party Type	•	•	•													
Representative	•	•	•													

Figure 44: Compatibility Matrix

11.3 Previewing a Report

At any time during the process of creating a report, look in the *Preview* section at the bottom of the page, in order to view the final structure of the report (Figure 45). The *Preview* will not be ready for viewing unless the user has at least one table row defined.

All your added report components and structuring results will be displayed in the *Preview* section which helps you to check whether the report matches the required output or not. This section can be expanded in order to display whole of the information.

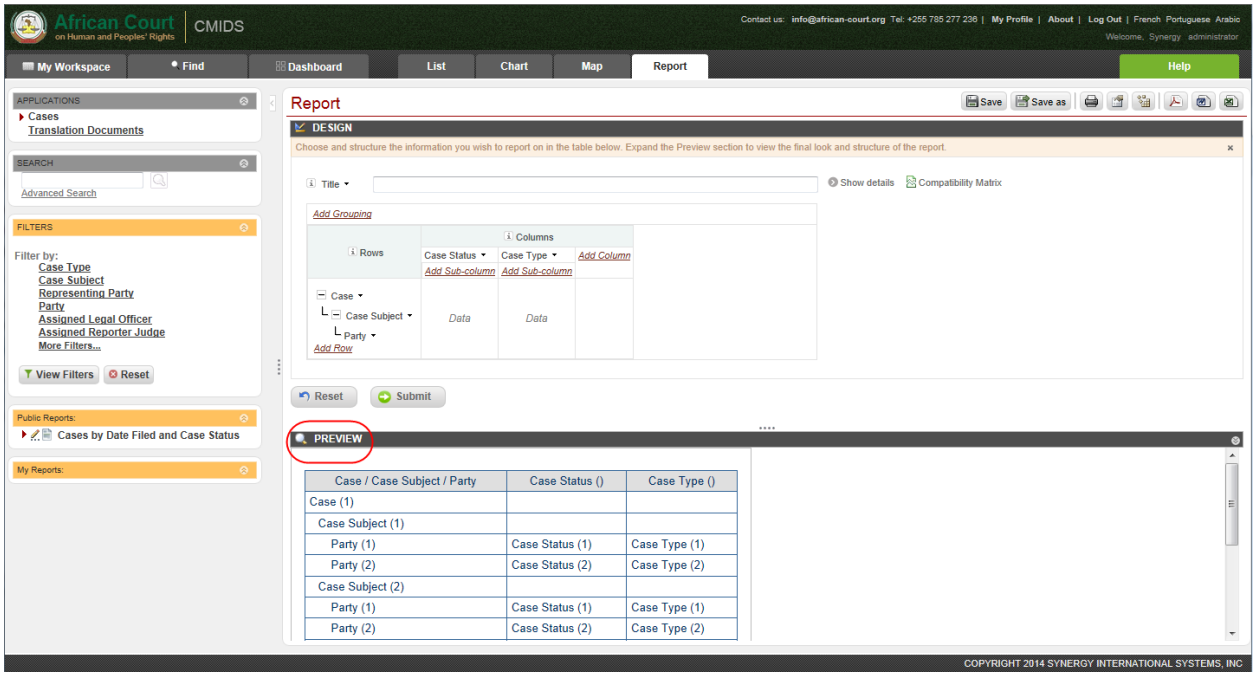
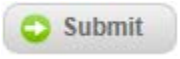


Figure 45: Previewing the Report

11.4 Generating a Report

The final step in the process of creating a report is report generation. By clicking the 

(Submit) button, a request to the Reporting Engine is submitted in order to access the database, gather the required data and present it in the manner required. The report containing all the real data appears in a new window.

11.5 Customizing Reports

You can customize the reports by assigning font characteristics to report components, re-ordering rows and columns, etc. The sections below will describe how to customize the reports.

11.5.1 Formatting/Styling Report Components

You may format/style the text entries as well as main report table captions and values by assigning to them value characteristics such as font, font size, font color, background color, alignment (i.e. left, center, or right), etc.

In order to format/style a report component, follow the steps below:

1. Click the report component that needs to be formatted / styled.
2. Select the **Properties** option from the actions list that appears (Figure 46).

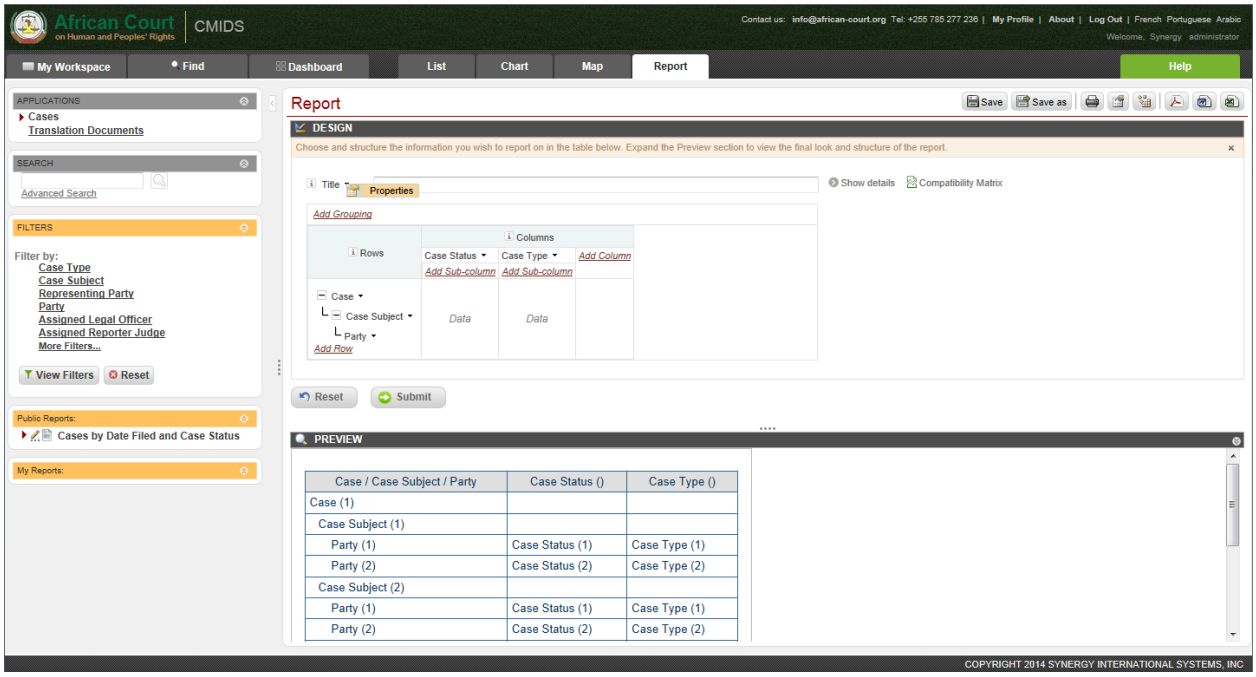


Figure 46: Reports Window with Properties Focus on the Title Field

The *Properties* window will appear. Please note that for text entries the *Properties* window includes text formatting buttons and a text area (Figure 47). For other report components, like rows, columns, etc., the *Properties* window also allows assigning additional characteristics (Figure 49), e.g. sorting order, reference text, etc.

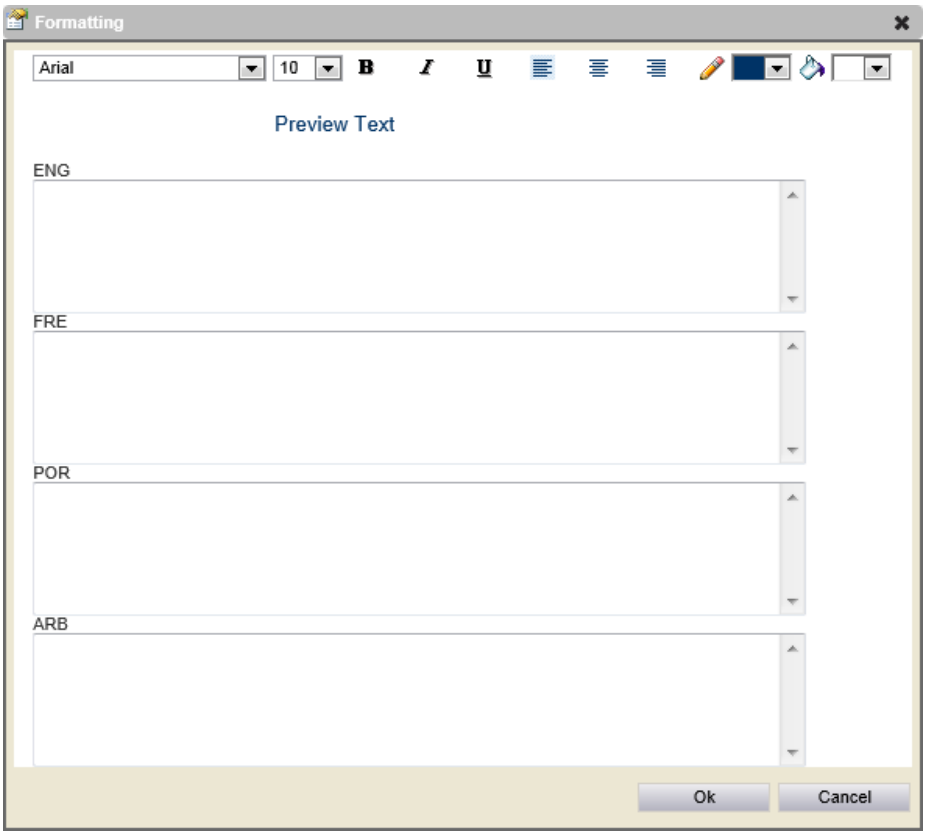


Figure 47: Formatting / Styling Text Entries

3. Change the properties as needed.

Note: To prevent you navigating away from the section every time when modifying the properties of a different report table component, the *Properties* window allows selecting the next item to be modified. To do that, you need to select the appropriate instance from the *Items* drop-down list in the *Properties* window. The list contains the previously selected report table components.

4. Click the **Apply** button for the changes to take effect. Clicking the **Ok** button will close the window and navigate you to the *Report* module.

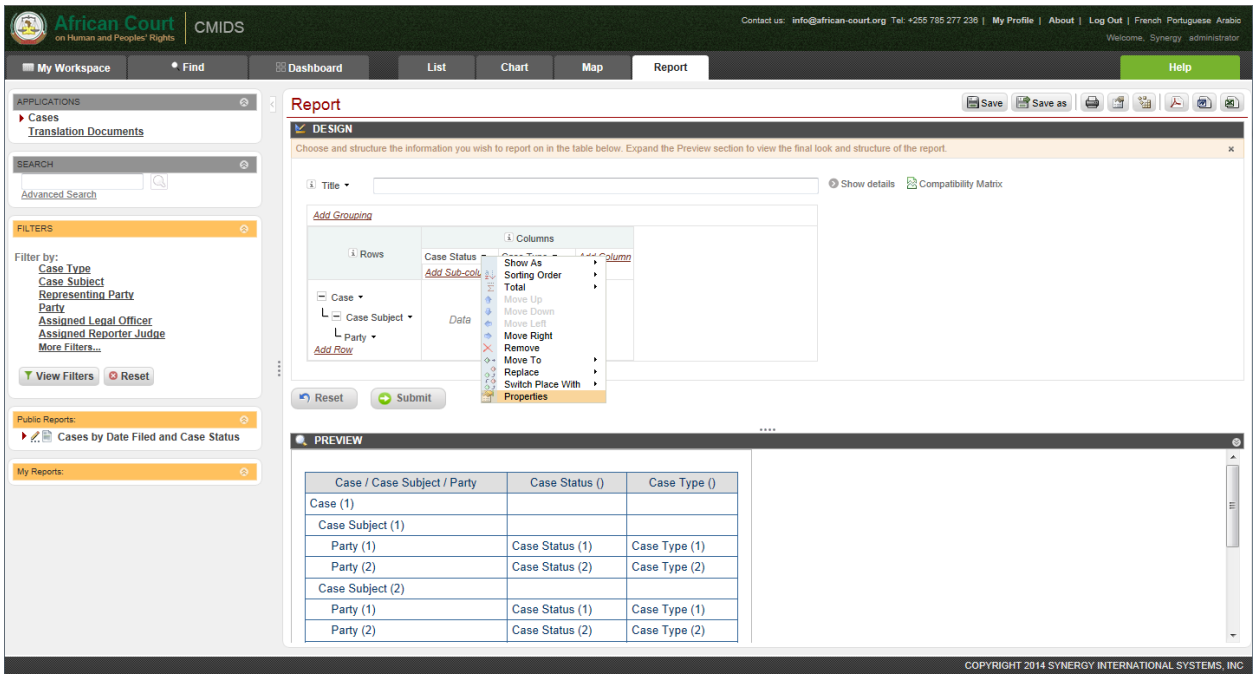


Figure 48: Reports Window with Properties Focus on the Column

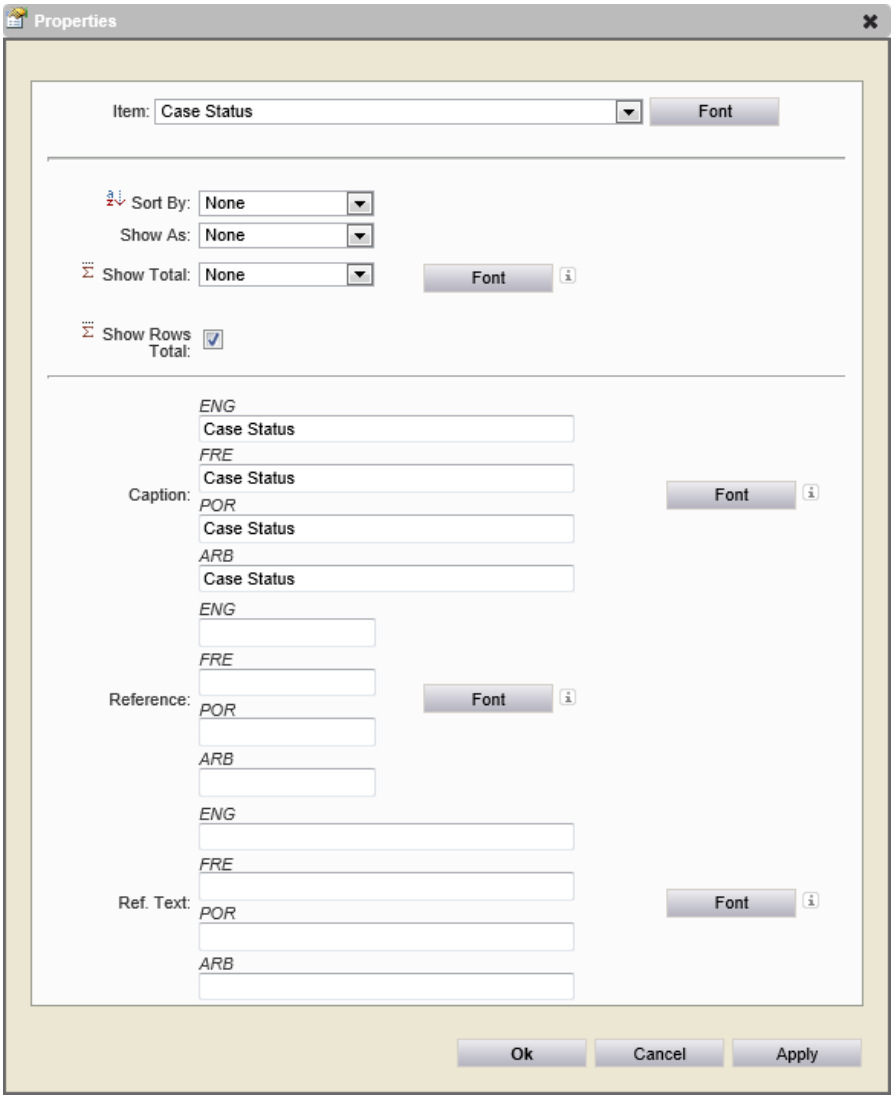


Figure 49: Assigning Properties to Report Table Components

11.5.2 Re-ordering Report Table Components

This option enables the user to establish and modify the order of the report table components, like rows, columns, etc.

In order to re-order report table components, the user should follow the steps described below.

1. Click the component item that needs to be reordered in the report.
2. Select the respective **Move Up / Move Down / Move Right / Move Left** option from the menu that appears. The report generated will maintain the order of the items that was displayed in the *Report Designer* (Figure 50).

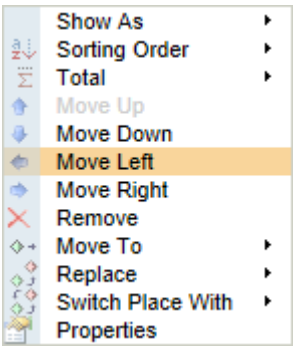


Figure 50: Re-ordering Report Table Components

Note: If any of these actions is not available, the respective option will be disabled in the menu.

11.5.3 Sorting Report Table Components

You may change the order in which the table components will appear in the final report. The report table components can be sorted either in an *Ascending* (A-Z) or a *Descending (Z-A)* order.

In order to alphabetically sort the report table components, follow the steps below:

1. Click the component item for which the sorting order needs to be changed.
2. Select the **Sorting Order** option from the actions list (Figure 51).

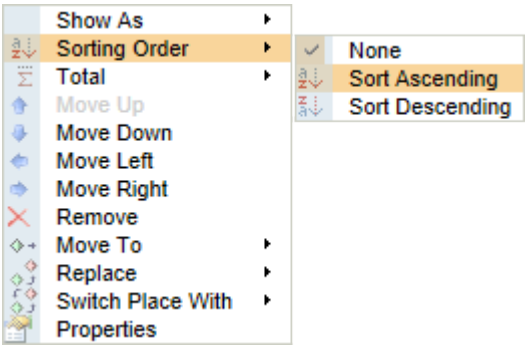


Figure 51: Defining the Sorting Order

3. Define whether the report item values should be sorted in the ascending or descending order. Please note that selecting the **None** option from the list removes the sorting criteria.

Note: The sorting order for the report components can also be defined from within the *Properties* window.

11.5.4 Removing a Report Table Component

It is possible to remove a report table component from being included in the report, if this is necessary.

In order to remove a report table component, follow the steps below:

1. Click the component item that needs to be removed.

2. Select the **Remove** option from the menu that appears. The selected grouping value will be removed.

11.5.5 Switching Report Table Components

The report table components may be switched between report grouping, rows and columns. If there are sub-columns selected, switching between table groupings / rows and columns is disabled. It is possible to switch between table groupings / rows and sub-columns.

In order to switch report table components, follow the steps below:

1. Click the component item that needs to be switched.
2. Select the **Switch Place with** option from the menu that appears (Figure 52).

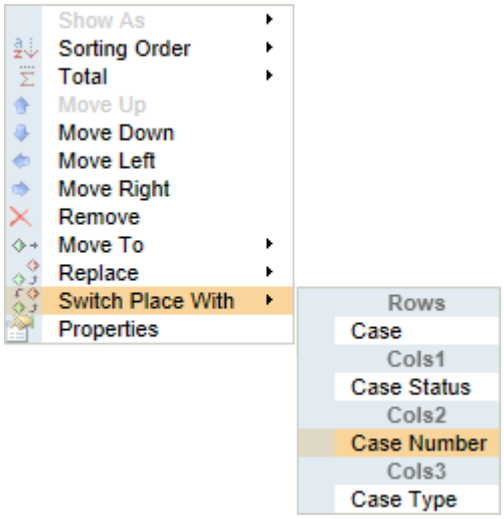


Figure 52: Switching Report Table Components

3. Define what component item the selected instance needs to switch place with. The selected component item will be removed from its current position and added as an item to the specified component. For instance, if it is selected to switch between table grouping and row, the selected table grouping item will be removed from table grouping and added as the row item, while the row item will 'trade' places with the table grouping item.

11.5.6 Building Complex Expressions

CMIDS is incorporated with a tool that allows building complex expressions based on mathematical equations. These expressions can then be used as column and sub-column items when drawing up a report.

In order to add an expression for a report table component, follow the steps below:

1. Click the component item the expression should be created for.
2. Select the **Expressions** option from the menu that appears (Figure 53). The *Expressions* window will appear (Figure 54).

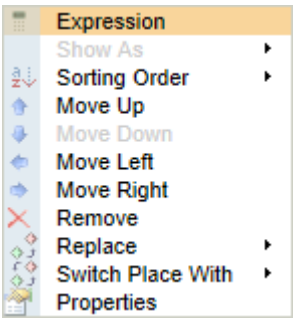


Figure 53: Building Expressions for Report Table Components

3. Select the expression members and arithmetic operation from the respective drop-down lists (Figure 53).
4. Click the **Ok** button to save the expression. The newly added expression will appear in the categories list.

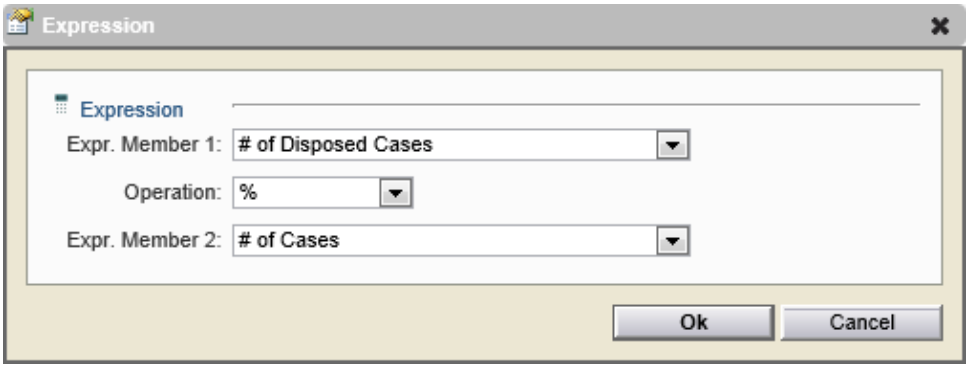


Figure 54: Adding an Expression

12. DETAILS SECTION

The *CMIDS* application has a built-in *Details* section, where you can view detailed project information, e.g. case type, legal fees, date of first trial, case parties, etc.

The *Details* section can be accessed from the *My Workspace*, *Find*, *List*, *Chart*, *Map,* and *Report* modules. In the *Details* section, you can view detailed case information, browse among other cases listed under the same parent item, print case details, etc. Moreover, if you have the corresponding permissions you can add a new case, modify or delete an existing one.

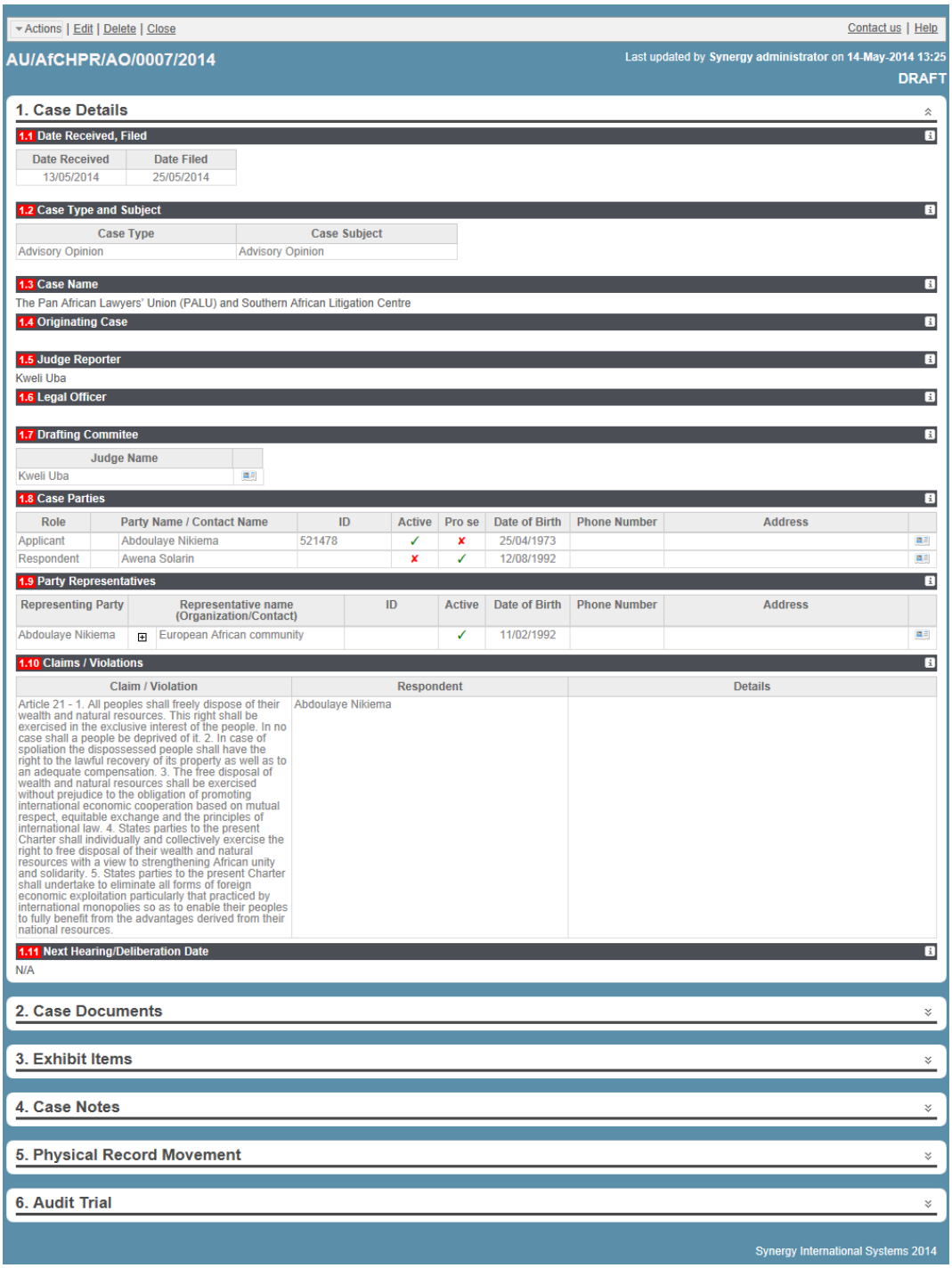

Actions | Edit | Delete | Close
Contact us | Help
AU/AfCHPR/AO/0007/2014
Last updated by Synergy administrator on 14-May-2014 13:25
DRAFT
1. Case Details
1.1 Date Received, Filed
Date Received
Date Filed
13/05/2014
25/05/2014
1.2 Case Type and Subject
Case Type
Case Subject
Advisory Opinion
Advisory Opinion
1.3 Case Name
The Pan African Lawyers' Union (PALU) and Southern African Litigation Centre
1.4 Originating Case
1.5 Judge Reporter
Kweli Uba
1.6 Legal Officer
1.7 Drafting Commitee
Judge Name
Kweli Uba
1.8 Case Parties
Role
Party Name / Contact Name
ID
Active
Pro se
Date of Birth
Phone Number
Address
Applicant
Abdoulaye Nikiema
521478
25/04/1973
Respondent
Awena Solarin
12/08/1992
1.9 Party Representatives
Representing Party
Representative name (Organization/Contact)
ID
Active
Date of Birth
Phone Number
Address
Abdoulaye Nikiema
European African community
11/02/1992
1.10 Claims / Violations
Claim / Violation
Respondent
Details
Article 21 - 1. All peoples shall freely dispose of their wealth and natural resources. This right shall be exercised in the exclusive interest of the people. In no case shall a people be deprived of it. 2. In case of spoliation the dispossessed people shall have the right to the lawful recovery of its property as well as to an adequate compensation. 3. The free disposal of wealth and natural resources shall be exercised without prejudice to the obligation of promoting international economic cooperation based on mutual respect, equitable exchange and the principles of international law. 4. States parties to the present Charter shall individually and collectively exercise the right to free disposal of their wealth and natural resources with a view to strengthening African unity and solidarity. 5. States parties to the present Charter shall undertake to eliminate all forms of foreign economic exploitation particularly that practiced by international monopolies so as to enable their peoples to fully benefit from the advantages derived from their national resources.
Abdoulaye Nikiema
1.11 Next Hearing/Deliberation Date
N/A
2. Case Documents
3. Exhibit Items
4. Case Notes
5. Physical Record Movement
6. Audit Trial
Synergy International Systems 2014

Figure 55: Details Section

12.1 Accessing the Details Section

In order to access the *Details* section, follow the steps below:

1. Access the *Details* section by clicking on the one of the following:
   - In the *My Workspace* module: Click the case number of the respective case. You will be directed to the *Details* section.
   - In the *Find* module: Click the case number of the respective case. You will be directed to the *Details* section.
   - In the *List module*: Click the respective case for the details to be displayed. This will open the *Details* section of the application where more detailed information about the case will be displayed.
     Note: Depending on the list representation settings, additional expanding of the list items may be required to reach the case.
   - In the *Chart* module: Click the chart for the details to be displayed (e.g., click a relevant bar to see what it consists of). This will open the *Details* section of the application where all items matching the selection will be listed. Select the case to view its details.
   - In the Map module: Point the mouse cursor on the object on the map. The information window will appear. In order to access the *Details* section, select the **View Cases** link. This will open the *Details* section. Select the case to view its details.
   - In the *Report* module: Create a report indicating **Case** as a value for the report row and click the **Submit** button. For more details on how to create and generate reports, please see Creating a Report. In the report generated, click the case name.
2. Take the necessary actions (review the provided information, update and improve as needed). The **Close** button is used to return to the main screen.

12.2 Browsing Case Records

If you access the *Details* section from the *Chart* and *Map* modules, you may be required to browse among the cases recorded in the system to locate the one that you want to have more detailed information about.

To browse case records, use the respective page number found at the bottom of the cases table. Click the respective case record to view its details.

Note: If you are accessing the *Details* section from the *Chart* and *Map* modules, you can also find the corresponding item in the table displayed above the *Details* window and click it to view its details.

12.3 Editing an Existing Case

In the *Details* section, you may also edit those existing cases that have been either created by yourself or you have permissions to manage.

In order to edit existing cases, follow the steps below:

1. Click the **Edit** button at the top of the *Details* window. The data input window appears which is described in the *CMIDS Case Application User Manual* in REFERENCES.
2. Make the appropriate changes in the input window and save.

12.4 Deleting an Existing Case

In the *Details* section, you may also delete those existing cases that have been either created by yourself or you have permissions to manage.

In order to delete existing cases, click the **Delete** button at the top of the *Details* window.

13. CUSTOMIZED REPORTING

The *CMIDS* application allows you to customize the already-created reports in the *List*, *Chart*, *Map,* and *Report* modules, i.e. to define the way the numeric values can be displayed, their format, the number of the items to be displayed, etc. You may also re-organise the reports in the desired way, i.e. include it into a group of reports or create a new report group for it, rename the report, etc. *CMIDS* can also export the reports to the desired format (Word, Excel, etc.) or print them out.

13.1 Setting Report Options

In the *List* and *Report* modules, you can set the report options, i.e. define whether the numeric values should be displayed in thousands, millions, etc.

In order to set the report options, follow the steps below:

1. Click the **(Set Options)** button in the top toolbar. An *Options* window (Figure 56) will appear.
2. Define the format in which the numeric values should be displayed, i.e. whether the original values should be displayed or they should be shown in thousands, millions, etc. This prevents large numeric values represented by many zeroes from taking a lot of space in the report.

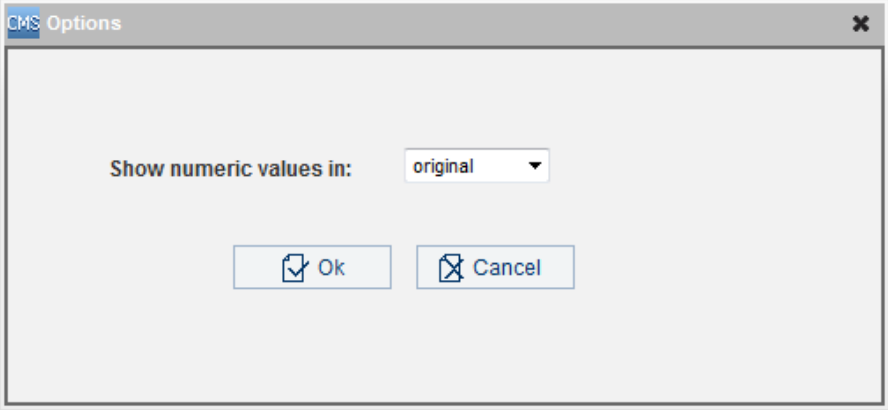


Figure 56: Setting the Report Options

3. After finishing, click the **Ok** button for the changes to take effect. Or, click the **Cancel** button to discard the changes made.

13.2 Saving Reports

After creating reports of different types, you can save them as pre-defined reports and include them either in the *Public Reports* group and make them available for all users who access application or in the *My Reports* group available to you only.

There are two ways of saving a report in the *CMIDS* application. You can save a newly-created report, or save a copy of an existing report with a different name, in a different location, or with a different content.

13.2.1 How to Save New Reports

From the *List*, *Chart*, *Map*, and *Report* modules, you can design an appropriate report and save it. In order to save the report created, follow the steps below:

In order to save the report created, follow the steps below:

1. Click the Save button on the top right side of the screen. A *Memorize Report* window (Figure 57) will appear.
2. Define the report name in the *Memorized Name*.

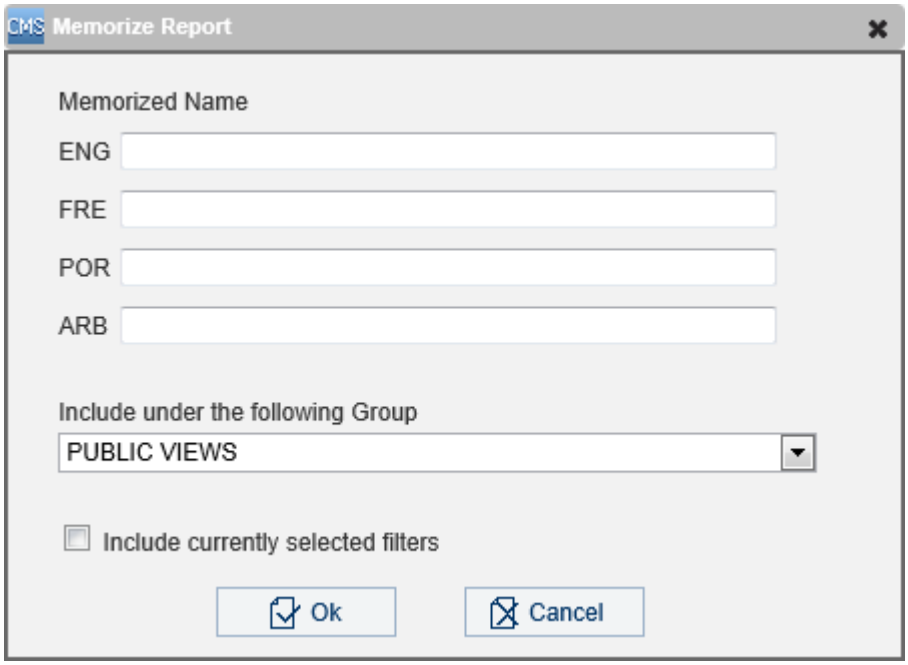


Figure 57: Memorizing a Report

3. Specify the group the report will be included in by selecting the appropriate value from the *Include under the following Group* combo box.
4. Check the *Include currently selected filters* checkbox to save filtering defined along with the report.
5. Click the **Ok** button to save the report for future reference or click **Cancel** to discard the changes made.

13.2.2 How to Save a Copy of the Report

In the *CMIDS* application, you can save a copy of an existing report. The copy of the report can be saved in a different location, with a different name or edited content.

In order to save a copy of a report, follow the steps below:

1. Click the Save as button on the top right side of the screen. A *Memorize Report* window (Figure 57) will appear.
2. Save the report by the steps described in the section above.

13.3 Re-organising Reports

You can organise the reports in the desired way, i.e. rename the reports, create groups to include reports under, etc.

From the *List*, *Chart, Map,* and *Report* modules, you can design appropriate reports and organise them in the preferred way. In order to organise the reports, click the respective **(Organise Views / Charts /Maps / Reports)** button at the top right side of the screen. An *Organise Reports* window (Figure 58) will appear. You may perform the following actions:

- Renaming Reports and Report Groups
- Deleting Reports or Report Groups
- Adding a Sub-group
- Re-ordering Reports and Groups
- Setting a Report as Default

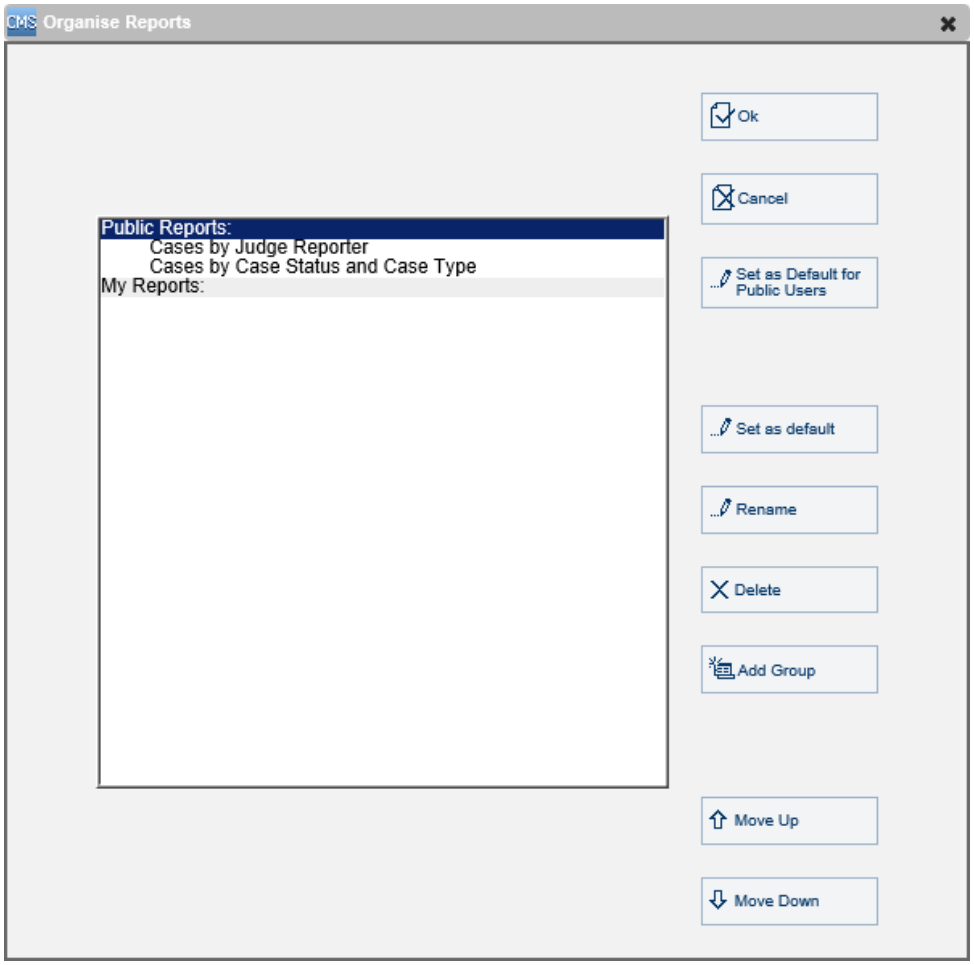


Figure 58: Organising the Reports

13.3.1 Renaming Reports and Report Groups

In order to rename a report / report group, follow the steps below:

1. Highlight the report / report group to be renamed.

2. Click the **Rename** button.
3. Fill in the desired name for the report / report group.
4. Click the **Enter** keyboard button to confirm renaming.

Note: *Public Reports* and *My Reports* groups cannot be renamed.

13.3.2 Deleting Reports or Report Groups

In order to delete a report / report group, follow the steps below:

1. Highlight the report / report group to be deleted.
2. Click the **Delete** button.
3. Click the **Ok** button to confirm deletion.

Note: *Public Reports* and *My Reports* groups cannot be deleted.

13.3.3 Adding a Sub-group

In order to add a sub-group, follow the steps below:

1. Click the **Add Group** button.
2. Fill in the desired name for the sub-group.
3. Click the **Enter** keyboard button to confirm adding.

13.3.4 Re-ordering Reports and Groups

In order to re-order reports / report groups, follow the steps below:

1. Highlight the report / report group the sorting order of which needs to be changed.
2. Click the **Move Up / Move Down** button.

13.3.5 Setting a Report as Default

In order to set a report as default, follow the steps below:

1. Highlight the report to be displayed in the respective module when you access it.
2. Click the **Set as default** button. The selected report will be marked with *(default for me)* option.
3. If you need to set the report as default for public user access, click the **Set as Default for Public Users** button. The selected report will be marked with *(default for public users)* option.

Note: This option is available only in the *Chart* and *Report* modules.

13.4 Viewing Pre-defined Reports

In the *List, Chart*, *Map*, and *Report* modules, you can view the pre-defined reports stored under **Public Views/Charts/Maps/Reports** or **My Views/Charts/Maps/Reports** section (see *Main Menu Bar* description in CMIDS ANALYTICAL INTERFACE STRUCTURE) for data analysis and comparison. For this purpose, select the report to display and click one of the following **Generate Report** buttons to the left of the report name:

- - in the *List* module;

- - in the *Chart* module;
- - in the *Map* module;
- - in the *Report* module.

The selected report will open in the application window (*List, Chart*, and *Map* modules) or a new window (*Report* module). The same results can be achieved if you click the report name.

13.5 Editing Pre-defined Reports

To save you the time and the effort of structuring a report from the scratch when it is necessary to introduce some modifications in any of the pre-defined reports stored under **Public Reports** or **My Reports**, the *Edit* option has been designed in the *Report* module.

In order to edit reports, click the **(Edit)** button to the left of the report to edit. The selected report structure will be loaded in the application window giving you the possibility of formatting and styling it in the desired way. For more details on how to apply formatting to the reports, see Customizing Reports.

The pre-defined *List* and *Chart* reports stored in **Public Views/Charts** or **My Views/Charts** can also be edited after you have selected to view them (see Viewing Pre-defined Reports). Once the selected report is loaded in the application window, make the appropriate changes and save them. If you wish to keep the modifications, do not forget to save the modified report, see Saving Reports.

13.6 Exporting Reports

From the *Chart, Map,* and *Report* modules, you can design appropriate reports and export them in the PDF, MS Word, and MS Excel formats.

In order to export the reports in the PDF, MS Word, and MS Excel formats, follow the steps below:

1. Click the respective **(Export in PDF Format)** / **(Export in MS Word Format)** / **(Export in MS Excel Format)** button. A separate window will open.
2. Make changes, if necessary.

13.7 Printing Reports

From the *Chart, Map,* and *Report* modules, you can design appropriate reports and print them out.

In order to print out the selected report, follow the steps below:

1. Click the **(Print)** button on the top toolbar in the right side of the screen. A separate window will open.
2. Select the **Print** option.

14. FILTERING

The system allows for data filtration. Filtering is used to narrow down the information displayed in the reports. The filtration works in the Step-by-Step technology, which is used to implement new filtering over the results of the previous one. This option reduces the size of reports and makes them easier to read. Filters can be added to new or existing reports. Defined filtering is applicable for list, charts, maps, and reports.

The list of the most frequently-used filter categories is displayed under the *Filter by:* section. The list of all available filter categories is displayed when you click the **More Filters** link.

14.1 Creating Filtering Criteria

In order to create filtering criteria, follow the steps below:

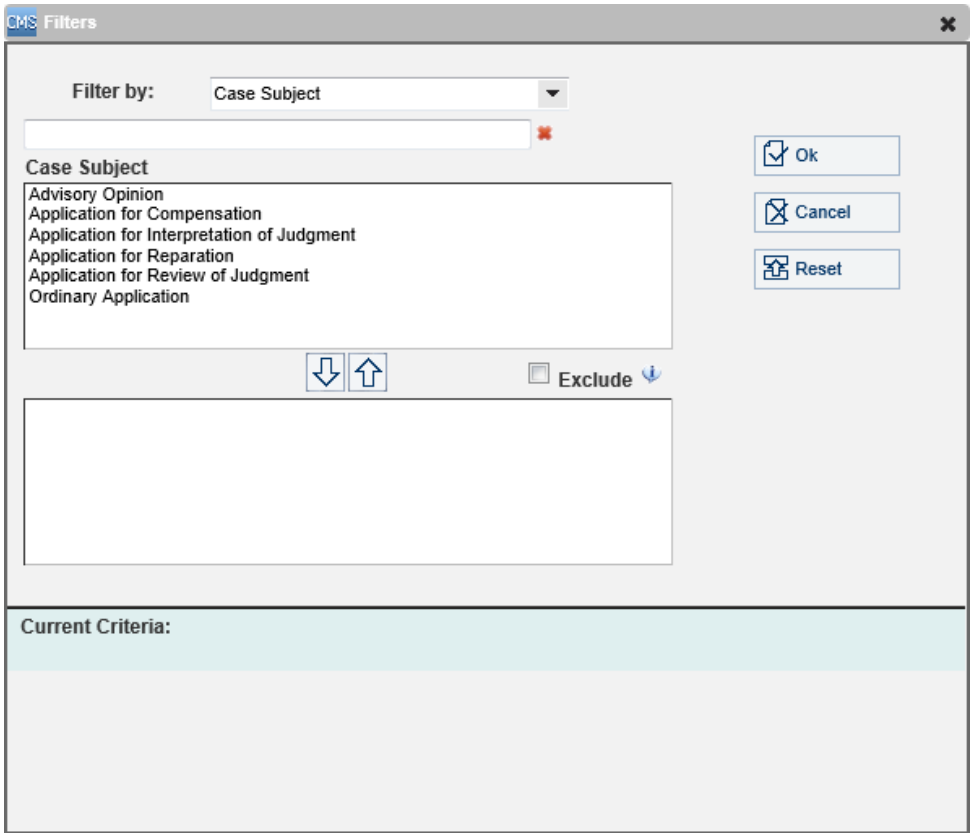


Figure 59: Filters

1. Click the hyperlink under the *Filters* section that represents the *Category* according to which the filtering will be carried out. A *Filters* window (Figure 59) will appear having the *Category Item* pull down menu set to the selected *Category*. The first text area holds a list of all the available *Category* items that the report could display, whereas the second text area holds a sub-set list of the first one. You may only edit the sub-set list in the second text area. At the end of the filtering, if the sub-set list is empty, all the *Category* items will be included in the report. If, however, the sub-set is non-empty, only the items in the sub-set list will be included in the report. At the bottom of the pop-up window the selection criteria from all categories are

presented. This view is also available by clicking the View Filters button on the main screen.

2. Select a *Category* item from the list in the first text area.
   Note: To make it easier to locate the appropriate category item in the long list, the *Filters* window has a search capability. To find the relevant category item, you can enter any combination of letters in the search field. The list of all category items matching the criteria will be displayed in the first text area (Figure 60). To remove the search criteria, use the **(Delete)** button to the right of the search field.
3. Click the downward-pointing arrow button to add the item selected to the list in the second text area (Figure 61).
4. Repeat steps 2 and 3 to add more than one *Category* item.
   Note: If a *Category* item needs to be removed from the second text area, select it from the list in the second text area and click the upward-pointing arrow button.
5. Click the **Ok** button to apply the filtering to the ad-hoc query and to the screen that was active prior to the filtering alterations (i.e. List, Chart, Map, or Report). The system will regenerate and download, to the client's side, an updated report that applies the updated filtering criteria.

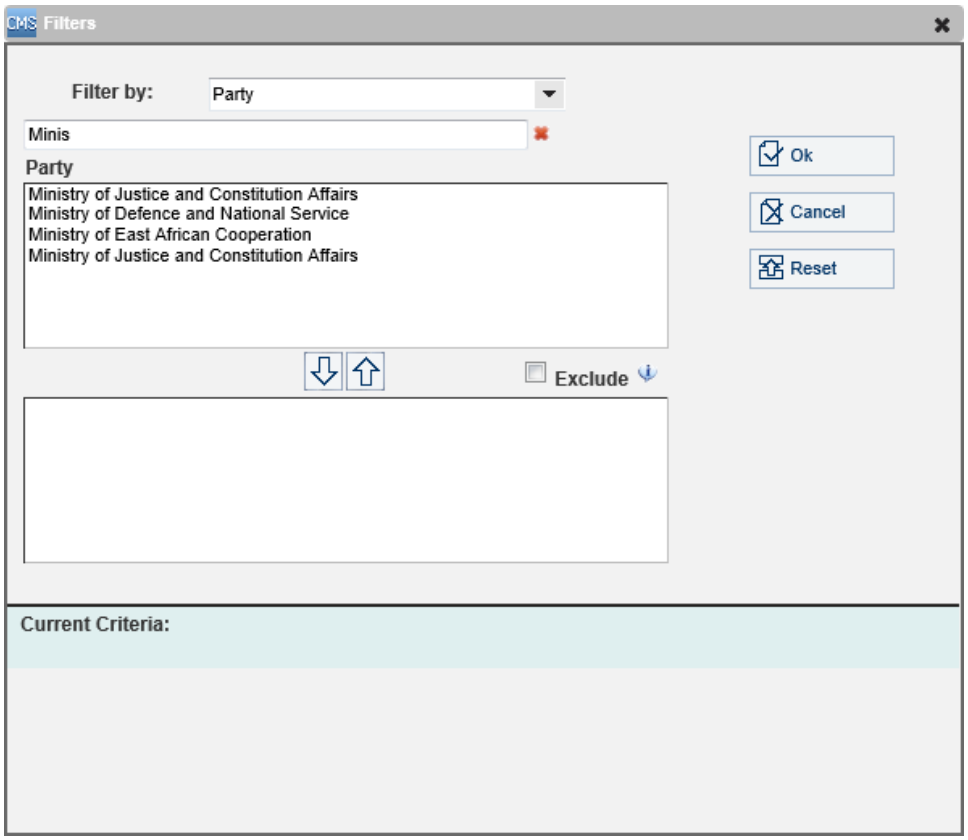


Figure 60: Searching for a Category Item

Note: It is possible to exclude a *Category* item(s) from being included into the filtering criteria to be created. In this case, click the *Exclude* checkbox. All the *Category* items that appear in the second text area will be excluded from the filtering criteria to be created.

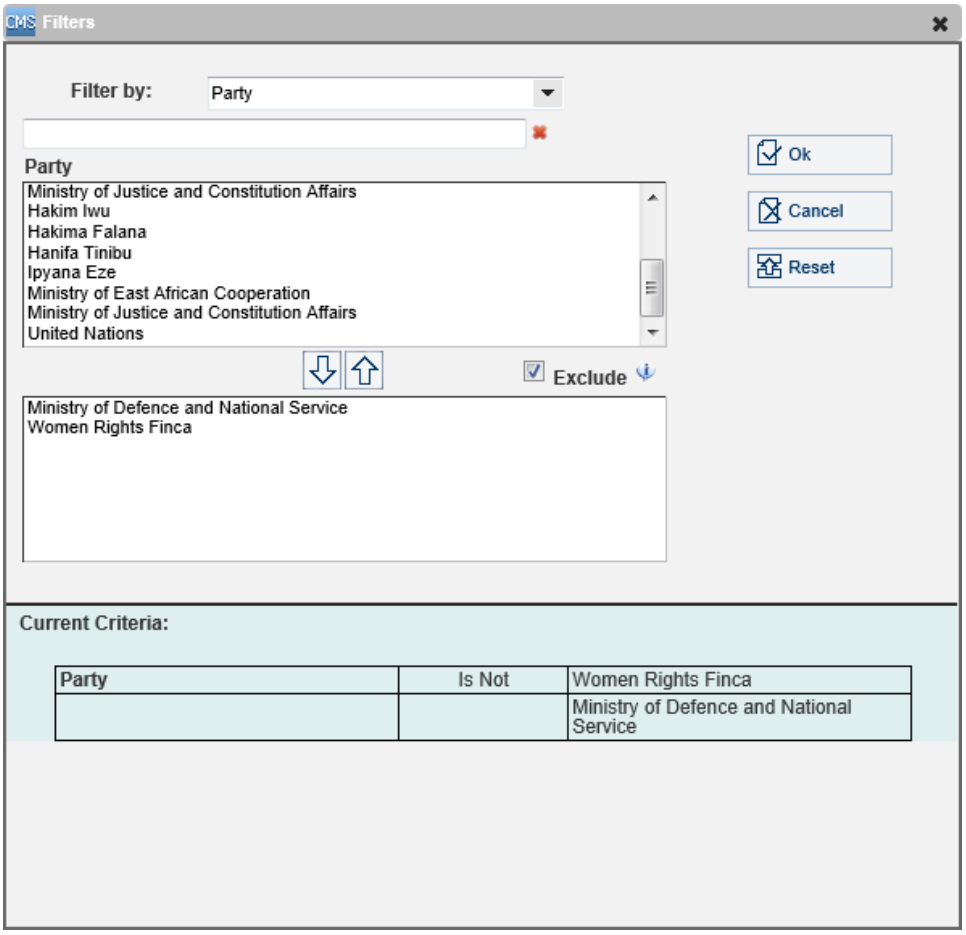


Figure 61: Creating Sample Filtering Criteria

15. SEARCH

The *CMIDS* application is equipped with a comprehensive search mechanism, which allows searching for any relevant information.

15.1 Simple Search

The simple search interface is available to find any relevant information quickly and easily within the integrated *CMIDS* content. Simple search implies that you can type search operators directly into the search box.

15.2 Advanced Search

In addition to providing easy access to the content, the *CMIDS* application has a number of specific features that is used to find exactly what is looked for. One of these features is advanced search that allows setting different complex conditions using the *Advanced Search* form. It gives several additional fields which may be used to qualify searches by such criteria as case number, assigned judge, clerk, etc.

In order to create search criteria, follow the steps below:

1. Click the **Advanced Search** link under the *Search* section. The *Advanced Search* form appears (Figure 62).

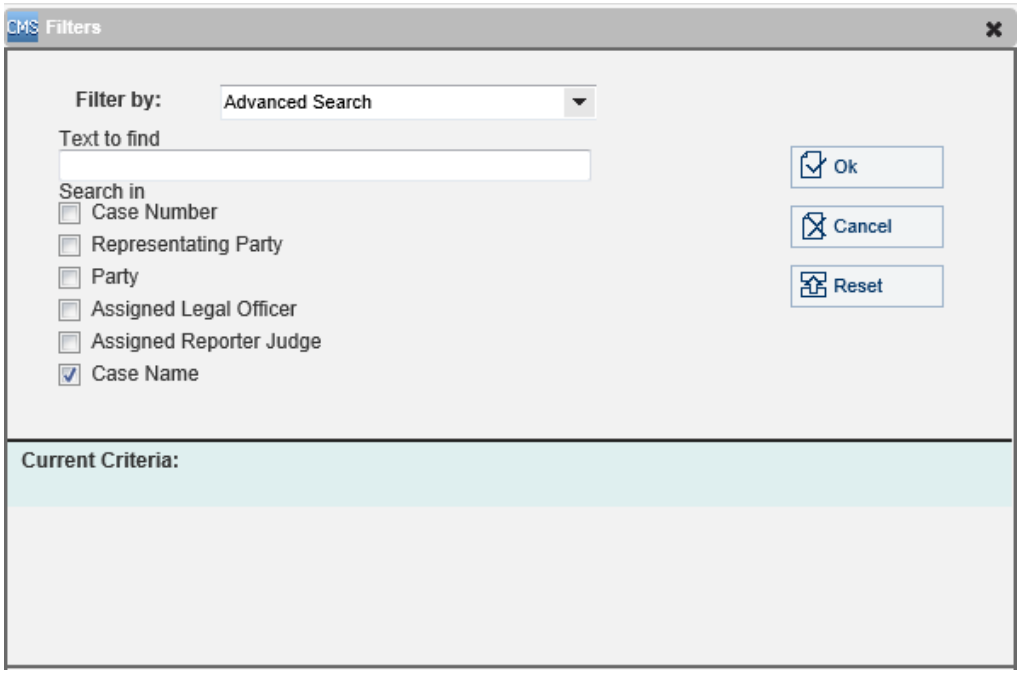


Figure 62: Advanced Search Section

2. Define the text to search for in the appropriate field.
3. Specify the fields to look in by selecting the appropriate checkbox(es).
4. Click the **Ok** button to apply the search criteria to the ad-hoc query and to the screen that was active prior to the filtering alterations (i.e. List, Chart, Map or Report).

16. LOGGING OUT

Once you have finished using the *CMIDS* application, it is necessary to terminate the session and log off. In order to log off from the application, press the **Log Out** button in the upper right corner of the application window.

17. REFERENCES

Please refer to the following CMIDS related documents:

- CMIDS Case and Document Translation Processing Workflow User Manual
- CMIDS Case Application User Manual
- CMIDS Document Translation Application User Manual
- CMIDS Administration Center User Manual